

Project Requirements and Design Document (PR&DD) Appointment Types Standardization Phase II

Project: Appointment Types Standardization Phase II

Project Number: PAS 097350

Component UDFs: PAS 097351 PAS Profiles and File/Table Build (Section 4.1)
 PAS 097352 Templates Build (Section 4.2)
 PAS 097353 Schedules (Section 4.3)
 PAS 097354 Appointment Booking (Section 4.4)
 PAS 097355 Operational Forces (OPS Forces) Booking (Section 4.5)
 PAS 097356 Output Reports/Forms (Section 4.6)
 PAS 097360 System Impacts (Section 5)

>>> 1. PROJECT OVERVIEW

Background:

CHCS currently allows each Medical Treatment Facility (MTF) to create site specific appointment types. The intent of the Appointment Standardization Project is to provide a DOD standard set of appointment types to be used at all medical clinics at all CHCS facilities. A series of meetings have been held between SAIC, the Clinical Information Technology Program Office (CITPO) and the TRICARE Management Activity (TMA). The outcome of these meetings was a set of requirements for Appointment Standardization.

- Search for available appointments by Standard Appointment Type and/or Detail Code(s)
- Permit the authorized user to change any of the following values for an appointment slot at the time of booking: Appointment Type, Appointment Detail Code
- Provide a Self-Referral Appointing option. This option will permit appointing to a non-Primary Care Manager without entry of a referral
- Provide the capability to book a PCM appointment for an Active Duty patient, whose enrolling DMIS ID is defined as Ops Forces, with any PCM in any MCP Provider Group to which the patient's assigned PCM is a member

Phase 1 of this project consisted of the following:

- The standardized appointment types were populated into the existing Appointment Type file and the file modified to support standard and non-standard entries. Standard entries may not be modified or inactivated.
- The Appointment Detail Codes file was created and populated with the standard values previously defined by the TMA. This file supports standard and non-standard entries. Standard entries may not be modified or inactivated.

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1.1 Project Scope

The scope of this effort will include the following activities to support the standardization of CHCS Appointment Types (Phase 2):

- Search for available appointments by Standard Appointment Type
- Search for available appointments by Appointment Detail Codes
- Provide a Self-Referral Appointing option
- Modify PCM Booking for Ops Forces enrollees to permit primary care appointing to any PCM associated with any MCP Group and/or DMIS ID to which the assigned PCM is also associated

1.2 Technical Assumptions

- a. This enhancement will be packaged and deployed as a CPET+ to 4.604 (SPE-00-03).
- b. Appointment Detail Codes file will be enhanced to include Procedure, Age and Patient Priority detail codes. Sites will be responsible for the creation of the appointment detail codes for age.
- c. An authorized user may link multiple appointment detail codes to each CHCS clinic at the Clinic Profile level only.
- d. Appointment Detail Codes linked to a clinic will be applicable to all appointment types at the clinic and provider profile levels.
- e. At the individual appointment slot level, the user may only specify up to 3 appointment detail codes per appointment slot.
- f. During appointment searches, an authorized user may search for available appointments using up to 3 appointment detail codes. The use of more appointment detail codes used in the search will increase the probability of null searches.
- g. PAS Booking option will still be available as a secondary menu option. PAS Booking will be inactivated at a future date once the sites have had a reasonable amount of time to convert templates and schedules using the new detail codes.
- h. External resources needed for support:
 - Implementation
 - Product System Test
 - Government Testing
- i... NED design may cause minor changes to screen displays in PAS Profiles and ~~HCF~~ Booking options.

1.3 Project Issues

Issue #1: Workload by Appt Detail Code Report.

This report will list the number of Kept appointments by Appt Detail Code. Since there is the potential to have up to 3 detail codes per appointment, an appointment with 3 detail codes would “count” on the report 3 times. This potential for triple counting will be extremely misleading to the sites as it will yield significantly higher numbers than the workload numbers yielded in the PAS Statistical Reports, the WAM Outpatient Visit counts and the Worldwide Workload Report (WWR). From a workload accounting perspective, MTFs have had many questions concerning CHCS reports that appear on the surface to be counting the same data but yield different counts. This will be yet another report in this category. Secondly, there is a natural tendency at site to want to present their workload in the best possible light (i.e., more is better). This report will falsely feed into such a tendency.

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WIPT Response: The group recommended that the report title be changed from Workload to Schedule Utilization (or Planning?) since it is not intended to be a workload report. Also recommended that a footer should be included on each page to indicate that appointments may be double or triple counted and that the report reflects detail code activity for scheduling, not workload. The report should be run on the Schedule Entity file and should reflect the site plans for the schedules using detail codes to manage appointments.

Sites will need to build a second report to show detail code utilization of actual booking and run that on the Patient Appointment file showing actual execution.

SAIC Response: The PR&DD will be updated to include new Detail Code Utilization Report. Refer to Output Reports/Forms UDF, page 71 in the PR&DD.

Issue #2: Regional Non-Standard Appointment Types

During the TIMs, it was stated that the DOD would have the 18 standard appointment types, but they wanted the ability to add “regionally-approved” standard appointment types. If we give the sites/regions the ability to add additional appointment types, there is no way for us to know that an appointment type was “regionally approved” or if it is either a pre-existing entry created prior to standardization or if a site simply added the entry inappropriately. (A security key will be added to the option to add appointment types, but the security key will not mitigate the problem.)

Looking at the implementation of standardized appointment types, we must leave the pre-existing non-standardized appointment types in the file for a transition period as sites build appointment schedules and book appointments as far out into the future as 180 days or more. Upon installation of the software, we cannot automatically inactivate the non-standard appointment types as that would be the software equivalent of ripping the rug out from under their feet. Hence, the need for a transition period. If regions/sites have the capability to add non-DOD standard appointment types during the transition period, there is no way that we can later automatically inactivate those pre-existing non-standard appointment types as we would have no mechanism to distinguish them from the regionally-approved appointment types. In the long run, you will not have achieved your goal of appointment standardization.

WIPT Response: The WIPT agrees that sites will need a transition period after the standard appointment types and detail codes are installed in SPE-4 so that sites can change their templates and schedules and their encounter forms. During this period, they may find a need to add new appointment types to meet their local needs in the new appointing environment. Through MAJ Hill's Template Analysis Tool (TAT), TMA will be reviewing the results of the transition.

It is the firm intent of the WIPT to broadcast a cut-off date (sooner rather than later) after which a routine will be run to turn off all non-standard appointment types. T-CON*, APV, and N-MTF will not be inactivated and will remain as designed. TMA will inform the sites that they should begin now to phase out non-standard appointment types and to implement the standard appointment types prior to SPE-4. Our TRICARE Access Imperatives web site will reinforce this position.

SAIC Response: The Functional Overview for the Profiles and File/Table UDF in the PR&DD was updated based on the WIPT Response to Issue #2.

Issue #3: Updating Files When Detail Codes are Modified

If a booking clerk modifies appointment detail codes linked to a schedule slot during the appointment booking process, should both the Schedule Entity file and the Patient Appointment file be updated with the new detail codes. If the Schedule Entity file is updated with the new detail codes and the patient later cancels the

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pending appointment, the system will change the schedule slot status to open but the detail codes will remain the same as the edited values. If only the Patient Appointment file is updated when detail codes are modified during the appointment booking process and the patient cancels the pending appointment, the original detail codes linked to the schedule slot will be linked to the newly open schedule slot.

WIPT Response: (a) When booking an appointment, only the Patient Appointment file detail codes and appointment types, etc should be changed, not the Schedulable Entity file detail codes and appointment types. This will enable the site to track the planned versus actual detail codes, appointment types, etc. (b) In all cases the slot should maintain its original planned definition as much as possible. When a booked appointment is canceled and the detail codes on the actual appointment had been formerly changed to reflect the needs of the patient, the slot should maintain its original definition. If the appointment is rescheduled, the detail codes should default to the original slot detail codes but can be modified once more to meet new patient needs if the user has the appropriate security keys.

If an appointment is joined and is then canceled, the WIPT would like to know whether the original slot could revert to its initial definition as multiple slots. We realize this may not be possible but wanted to make sure.

SAIC Response: A new Appointment Booking business rule (#14) was added to the business rules on page 35 in the Appointment Booking UDF in the PR&DD to reflect the WIPT Response to Issue 3. The Browse functionality will not be modified at this time.

Issue #4: Free Text Reason for Changes to Appt Type/Detail Codes

Since a new Enter/Edit Appt Type/Detail Code Change Reason option is being provided, SAIC strongly recommends not having a 'Free Text' reason for making changes to either appointment detail codes or the appointment type linked to the schedule slot being booked.

WIPT Response: The WIPT decided to delete the requirement for the Appointment Change Reason codes and to keep the free text field only. The free text field should now be called the Appointment Change Reason. The WIPT feels that clerks will not fill in the reason code and realizes sites will decide how the reasons are entered and the policy on entering those reasons.

SAIC Response: The Appointment Change Reason Enter/Edit option has been deleted from the PR&DD. In addition, the free text field has been changed to Appointment Change Reason (refer to PCM Booking, Screen 9, Page 40 in the Appointment Booking UDF in the PR&DD).

Issue #5: Finalize Standard Entries for Detail Codes and Reasons for Change

SAIC recommends that the proponent review and resubmit the standard values for Detail Codes and Reasons for Change.

WIPT Response: The Detail Codes have not changed at this time and are being evaluated in the field by sites, beginning 1 September. The Reasons for Change have been deleted as a requirement by the WIPT. LTC Corey will keep development informed of any detail code changes and work with development to get the changes into the software.

SAIC Response: No response required from SAIC for this Issue.

1.4 Project Risks

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RISK: These requirements have been modified based upon verbal and written comments from LTC Montgomery and Julie Hart and represent increased scope from the original requirements used for cost estimates. Unless off-setting decreases in scope can be identified (see Project Issues Item c), there are significant schedule and cost risks that must be addressed.

TYPE OF RISK: Cost and Schedule

MITIGATION STRATEGY: Identify areas where the implementation of appointment detail codes is not required in this phase of the project. See Project Issues Item C.

1.5 External Interfaces

The following external systems will be impacted:

- ADS
- CEIS
- CRSP

>>> 2. PROJECT REQUIREMENTS

a. Proposed Changes to the Functional Description

Appointment Standardization Phase I Requirements:

PAS 3.2.10.....Support Managed Care Program.

PAS 3.2.10.3.2.....Schedule Appointment.

PAS 3.2.10.3.2.1.....Standard Appointment Types (new section)

1. CHCS shall no longer support the BOK (Book Appointment) option in the PAS Clerk Scheduling menu
2. CHCS shall provide standard appointment types
3. CHCS shall provide an appointment detail code file

Appointment Standardization Phase II Requirements:

a. Changes to the Functional Description

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PAS 3.2.10.....Support Managed Care Program.

PAS 3.2.10.3.2.....Schedule Appointment.

PAS 3.2.10.3.2.2.....Appointment Type Profile Enter/Edit option

1. CHCS shall allow an authorized CHCS user the capability to indicate that a specified appointment in the Appointment Type file is a medical appointment type that may be used by all medical clinics in the MTF.

PAS 3.2.10.3.2.3.....Appointment Detail Codes Enter/Edit option

1. CHCS shall allow an authorized CHCS user the capability to add non-standard appointment detail codes to the Appointment detail Codes file.
2. CHCS shall allow an authorized CHCS user the capability to modify non-standard appointment detail codes in the Appointment detail Codes file.
3. CHCS shall allow an authorized CHCS user the capability to inactivate any non-standard appointment detail code in the Appointment detail Codes file.

PAS 3.2.10.3.2.4.....Clinic Profile Edit option

1. CHCS shall allow an authorized CHCS user the capability to link appointment detail codes to the clinic in a medical clinic profile.
2. CHCS shall allow an authorized CHCS user the capability to delete any appointment detail code linked to the clinic in a medical clinic profile.
3. CHCS shall allow an authorized CHCS user the capability to enter self-referrals in the specified medical clinic.
4. CHCS shall require that the Clinic Specialty field in the specified Clinic Profile be populated when self-referral medical clinic appointments are allowed.

PAS 3.2.10.3.2.5.....List Appointment Type Profile

1. CHCS shall display/print as output the medical appointment type flag for each appointment type in the Appointment Type file when an authorized CHCS user elects to display/print the Appointment Type Profile List.

PAS 3.2.10.3.2.6.....List Clinic Profile option

1. CHCS shall display/print as output the appointment detail codes linked to the clinic in the clinic profile when an authorized CHCS user elects to display/print a medical clinic profile list.
2. CHCS shall display/print as output the Self-Referrals Allowed flag for the specified medical clinic when an authorized CHCS user elects to display/print the medical Clinic Profile List.

PAS 3.2.10.3.2.7.....Create/Edit Templates option

1. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for any appointment slot being added to or edited in a daily template for a provider in a medical clinic.
2. CHCS shall allow an authorized CHCS user to modify the appointment type duration when creating/editing a daily template for a provider in a medical clinic.

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PAS 3.2.10.3.2.8.....Print Templates option

1. CHCS shall display/print as output all appointment detail codes linked to all appointment slots in a daily/weekly template for a provider in a medical clinic when an authorized CHCS user elects to display/print a daily/weekly template.

PAS 3.2.10.3.2.9.....Create Schedules option

1. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to an appointment slot being added to a schedule for a provider in a medical clinic.
2. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for any appointment slot being added to a schedule for a provider in a medical clinic.
3. CHCS shall allow an authorized CHCS user to modify the appointment type duration when creating a schedule for a provider in a medical clinic.

PAS 3.2.10.3.2.10.....Print Schedules option

1. CHCS shall display/print as output the appointment detail codes linked to the appointment slots in a schedule for a provider in a medical clinic when an authorized CHCS user elects to display/ print a schedule for a specified date range.

PAS 3.2.10.3.2.11.....Maintain Schedules option

1. CHCS shall display the appointment detail codes linked to the appointment slots being edited in a schedule for a provider in a medical clinic.
2. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to an appointment slot being edited in a schedule for a provider in a medical clinic.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for any appointment slot being edited in a schedule for a provider in a medical clinic.

PAS 3.2.10.3.2.12.....Print Clinic/Provider Rosters option

1. CHCS shall display/print as output the appointment detail codes linked to the scheduled appointments on a specified provider roster for a provider in a medical clinic when an authorized CHCS user elects to display/ print a provider roster for a specified date range.
2. CHCS shall display/print as output the appointment detail codes linked to the scheduled appointments on a specified clinic roster for a medical clinic when an authorized CHCS user elects to display/ print a clinic roster for a specified date range.

PAS 3.2.10.3.2.13.....Print Outpatient Encounter Form option

1. CHCS shall display/print as output the appointment detail code linked to the scheduled appointment or unscheduled visit in a medical clinic when an authorized CHCS user elects to display/ print an outpatient encounter form.

PAS 3.2.10.3.2.14.....Display Patient Appointment option

1. CHCS shall display/print as output the the duration and appointment detail code/s linked to any scheduled appointment or unscheduled visit in a medical clinic when an authorized CHCS user elects to display/ print a selected patient's appointment history.

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Health Care Finder (HCF)

PAS 3.2.10.3.2.15.....Provider Search

1. CHCS shall only allow an authorized CHCS user to search for available medical appointment slots.
2. CHCS shall allow an authorized CHCS user to search for available medical appointment slots by appointment type, duration and/or appointment detail codes.
3. Searching by appointment detail codes shall be limited to no more than 3 detail codes.
4. CHCS shall display the appointment duration and detail codes linked to the clinic or appointment slot in the Appointment Display List.

PAS 3.2.10.3.2.16.....PCM Booking

1. CHCS shall allow an authorized CHCS user to change the appointment type for the selected medical appointment slot on the PCM Appointment Booking screen.
2. CHCS shall display the appointment duration and detail codes linked to the selected medical appointment slot on the PCM Appointment Booking screen.
3. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the selected medical appointment slot on the PCM Appointment Booking screen.
4. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the selected medical appointment slot on the PCM Appointment Booking screen.

PAS 3.2.10.3.2.17.....Referral Enter/Edit

1. CHCS shall display all appointment detail codes linked to the selected medical clinic for the Referral being entered/edited.
2. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the selected medical appointment request for the Referral being entered/edited.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the selected medical appointment request for the Referral being entered/edited.

PAS 3.2.10.3.2.18.....Referral Booking

1. CHCS shall display the appointment duration and detail codes linked to the selected medical appointment slot on the Referral Booking screen.
2. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the selected medical appointment slot on the Referral Booking screen.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the selected medical appointment slot on the Referral Booking screen.
4. CHCS shall allow an authorized CHCS user to change the appointment type for the selected medical appointment slot on the Referral Booking screen.

PAS 3.2.10.3.2.19.....Non Enrolled Booking

1. CHCS shall display the appointment duration and detail codes linked to the selected medical appointment slot on the Non Enrolled Appointment Booking screen

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2. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the selected medical appointment slot on the Non Enrolled Appointment Booking screen.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the selected medical appointment slot on the Non Enrolled Appointment Booking screen.
4. CHCS shall allow an authorized CHCS user to change the appointment type for the selected medical appointment slot on the Non Enrolled Booking screen.

PAS 3.2.10.3.2.20.....Non MTF Booking

1. CHCS shall display the appointment duration and detail codes linked to the selected medical appointment slot on the Non MTF Appointment Booking screen
2. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the selected medical appointment slot on the Non MTF Appointment Booking screen.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the selected medical appointment slot on the Non MTF Appointment Booking screen.

PAS 3.2.10.3.2.21.....Non MTF Log Report

1. CHCS shall display/print as output the appointment detail codes linked to the Non MTF appointments when an authorized CHCS user elects to display/ print the Non MTF Log Report for a specified date range.

PAS 3.2.10.3.2.22.....Self-Referral Appointment Booking

1. CHCS shall allow an authorized CHCS user to search for available appointment slots in a specialty care clinic allowing self-referrals upon patient request.
2. CHCS shall allow an authorized CHCS user to search for available medical appointment slots by appointment type and/or appointment detail codes in a specialty care clinic allowing self-referrals.
3. CHCS shall display the appointment duration and detail codes linked to the available specialty care clinic appointment slot in the Self-Referral Appointment Display List.
4. CHCS shall allow an authorized CHCS user to change the appointment type for the selected specialty care appointment slot on the Self-Referral Appointment screen.
5. CHCS shall display the appointment duration and detail codes linked to the selected specialty care appointment slot on the Self-Referral Appointment screen.
6. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the selected specialty care appointment slot on the Self-Referral Appointment screen.
7. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the selected specialty care I appointment slot on the Self-Referral Appointment screen.
8. CHCS shall allow an authorized CHCS user to enter a reason for the self-referral appointment.

PAS 3.2.10.3.2.23.....Self-Referral Appointment Booking Report

1. CHCS shall allow an authorized CHCS user to display/print a list of all scheduled appointments in specialty care clinics allowing self-referrals for a specified date range.
2. CHCS shall allow an authorized CHCS user to generate the Self-Referral Appointment Booking Report by division, clinic, provider, and patient.

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PAS 3.2.10.3.2.24.....Wait List Request option

1. CHCS shall display all appointment detail codes linked to the selected medical clinic for the Wait List Request being entered/edited.
2. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the selected the Wait List Request being entered/edited.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the selected - the Wait List Request being entered/edited.

PAS 3.2.10.3.2.25.....Wait List Processing option

1. CHCS shall display the appointment detail codes linked to the selected Wait List Request being processed.
2. CHCS shall allow an authorized CHCS user to delete the appointment detail code linked to the selected Wait List Request being processed.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the selected Wait List Request being processed.

PAS 3.2.10.3.2.26.....Cancel By Facility option

1. CHCS shall display the appointment detail codes linked to the facility cancelled appointment being rescheduled.
2. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the facility cancelled appointment being rescheduled.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the facility cancelled appointment being rescheduled.

PAS 3.2.10.3.2.27.....Cancel By Patient

1. CHCS shall display the appointment detail codes linked to the appointment being rescheduled by the patient.
2. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the appointment being rescheduled by the patient.
3. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the appointment being rescheduled by the patient.

PAS 3.2.10.3.2.28.....Join Appointment Slots

1. CHCS shall allow an authorized CHCS user to change the appointment type for the newly joined medical appointment slot on the Single Patient Browse – Change screen.
2. CHCS shall display the appointment detail codes linked to the newly joined medical appointment slot on the Single Patient Browse – Change screen.
3. CHCS shall allow an authorized CHCS user to delete an appointment detail code for the newly joined medical appointment slot on the Single Patient Browse – Change screen.
4. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the newly joined medical appointment slot on the Single Patient Browse – Change screen.

PAS 3.2.10.3.2.29..... Split Appointment Slot

1. CHCS shall allow an authorized CHCS user to change the appointment type for the newly split medical appointment slot on the Single Patient Browse – Change screen.
2. CHCS shall display all appointment detail codes linked to the newly split medical appointment slot on the Single Patient Browse – Change screen.

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3. CHCS shall allow an authorized CHCS user to delete an appointment detail code linked to the newly split medical appointment slot on the Single Patient Browse – Change screen.
4. CHCS shall allow an authorized CHCS user to select up to 3 appointment detail codes for the newly split medical appointment slot on the Single Patient Browse – Change screen.

PAS 3.2.10.3.2.30.....Operational Forces (PCM Booking)

1. CHCS shall allow an authorized CHCS user the capability to book primary care appointments for an Active Duty Operational Forces enrollee to any provider associated with any MCP Group and/or DMIS ID to which the Operational Forces enrollee's assigned PCM is also associated.

PAS 3.2.10.3.2.31.....HL7 Messages (deleted as a result of the NCA Consolidation Project)

!PAS 3.2.10.3.2.32.....Appointment Detail Code Change Reasons (deleted per customer request)

PAS 3.2.10.3.2.33.....Appointment Detail Code Schedule Utilization Report

1. CHCS shall allow an authorized CHCS user the capability to generate an Appointment Detail Code Schedule Utilization Report for a specified division, clinic, or provider.

b. Changes to the Requirements Matrix

PAS 3.2.10.....Support Managed Care Program.

PAS 3.2.10.3.2.....Schedule Appointment.

PAS 3.2.10.3.2.2.....Appointment Type Profile Enter/Edit option

- PAS 3.2.10.3.2.2-1.0..... allow authorized CHCS user capability to indicate that specified appointment in Appointment Type file is a medical appointment type that may be used by all medical clinics in MTF

PAS 3.2.10.3.2.3.....Appointment Detail Codes Enter/Edit option

- PAS 3.2.10.3.2.3-1.0..... allow an authorized CHCS user capability to add non-standard appointment detail codes to Appointment detail Codes file
- PAS 3.2.10.3.2.3-2.0..... allow an authorized CHCS user capability to modify non-standard appointment detail codes in Appointment detail Codes file
- PAS 3.2.10.3.2.3-3.0..... allow an authorized CHCS user capability to inactivate any non-standard appointment detail code in Appointment detail Codes file

PAS 3.2.10.3.2.4.....Clinic Profile Edit option

- PAS 3.2.10.3.2.4-1.0..... allow an authorized CHCS user capability to link appointment detail codes to clinic in medical clinic profile
- PAS 3.2.10.3.2.4-2.0..... allow an authorized CHCS user capability to delete any appointment detail code linked to clinic in medical clinic profile
- PAS 3.2.10.3.2.4-3.0..... allow an authorized CHCS user the capability to enter self-referrals in the specified medical clinic

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PAS 3.2.10.3.2.4-4.0..... require that Clinic Specialty field in the specified Clinic Profile be populated when self-referral medical clinic appointments are allowed

PAS 3.2.10.3.2.5.....List Appointment Type Profile

PAS 3.2.10.3.2.5-1.0..... display/print as output medical appointment type flag for each appointment type in Appointment Type file when an authorized CHCS user elects to display/print Appointment Type Profile List

PAS 3.2.10.3.2.6.....List Clinic Profile option

PAS 3.2.10.3.2.6-1.0..... display/print as output appointment detail codes linked to clinic in the clinic profile when an authorized CHCS user elects to display/print medical clinic profile list

PAS 3.2.10.3.2.6-2.0..... display/print as output Self-Referrals Allowed flag for the specified medical clinic when an authorized CHCS user elects to display/print medical Clinic Profile List

PAS 3.2.10.3.2.7.....Create/Edit Templates option

PAS 3.2.10.3.2.7-1.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for any appointment slot being added to or edited in daily template for provider in medical clinic

PAS 3.2.10.3.2.7-2.0..... allow an authorized CHCS user to modify appointment type duration when creating/editing a daily template for provider in medical clinic

PAS 3.2.10.3.2.8.....Print Templates option

PAS 3.2.10.3.2.8-1.0..... display/print as output all appointment detail codes linked to all appointment slots in daily/weekly template for provider in medical clinic when an authorized CHCS user elects to display/print daily/weekly template

PAS 3.2.10.3.2.9.....Create Schedules option

PAS 3.2.10.3.2.9-1.0.... allow an authorized CHCS user to delete an appointment detail code linked to an appointment slot being added to schedule for provider in medical clinic

PAS 3.2.10.3.2.9-2.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for any appointment slot being added to schedule for provider in medical clinic

PAS 3.2.10.3.2.9-3.0.... allow an authorized CHCS user to modify appointment type duration when creating schedule for a provider in medical clinic

PAS 3.2.10.3.2.10.....Print Schedules option

PAS 3.2.10.3.2.10-1.0..... display/print as output appointment detail codes linked to appointment slots in schedule for provider in medical clinic when an authorized CHCS user elects to display/ print schedule for a specified date range

PAS 3.2.10.3.2.11.....Maintain Schedules option

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- PAS 3.2.10.3.2.11-1.0..... display appointment detail codes linked to appointment slots being edited in schedule for provider in medical clinic
- PAS 3.2.10.3.2.11-2.0..... allow an authorized CHCS user to delete an appointment detail code linked to an appointment slot being edited in schedule for provider in medical clinic
- PAS 3.2.10.3.2.11-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for any appointment slot being edited in schedule for provider in medical clinic
- PAS 3.2.10.3.2.12.....Print Clinic/Provider Rosters option
- PAS 3.2.10.3.2.12-1.0..... display/print as output appointment detail codes linked to scheduled appointments on specified provider roster for a provider in medical clinic when an authorized CHCS user elects to display/ print a provider roster for specified date range
- PAS 3.2.10.3.2.12-2.0..... display/print as output appointment detail codes linked to scheduled appointments on specified clinic roster for medical clinic when an authorized CHCS user elects to display/ print clinic roster for specified date range
- PAS 3.2.10.3.2.13.....Print Outpatient Encounter Form option
- PAS 3.2.10.3.2.13-1.0..... display/print as output appointment detail code linked to the scheduled appointment or unscheduled visit in medical clinic when an authorized CHCS user elects to display/ print an outpatient encounter form
- PAS 3.2.10.3.2.14.....Display Patient Appointment option
- PAS 3.2.10.3.2.14-1.0..... display/print as output appointment duration and detail code linked to any scheduled appointment or unscheduled visit in medical clinic when an authorized CHCS user elects to display/ print selected patient's appointment history
- Health Care Finder (HCF)
- PAS 3.2.10.3.2.15-1.0.....Provider Search
- PAS 3.2.10.3.2.15-1.0..... only allow an authorized CHCS user to search for available medical appointment slots
- PAS 3.2.10.3.2.15-2.0..... allow an authorized CHCS user to search for available medical appointment slots by appointment type and/or appointment detail codes Searching by appointment detail codes shall be limited to no more than 3 detail codes.
- PAS 3.2.10.3.2.15-3.0..... display appointment duration and detail codes linked to the clinic appointment slot in Appointment Display List
- PAS 3.2.10.3.2.16.....PCM Booking
- PAS 3.2.10.3.2.16-1.0..... allow an authorized CHCS user to change appointment type for selected medical appointment slot on PCM Appointment Booking screen
- PAS 3.2.10.3.2.16-2.0..... display appointment duration and detail codes linked to selected medical appointment slot on PCM Appointment Booking screen
- PAS 3.2.10.3.2.16-3.0..... allow an authorized CHCS user to delete an appointment detail code linked to selected medical appointment slot on PCM Appointment Booking screen
- PAS 3.2.10.3.2.16-4.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for selected medical appointment slot on PCM Appointment Booking screen

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PAS 3.2.10.3.2.17.....Referral Enter/Edit

- PAS 3.2.10.3.2.17-1.0..... display all appointment detail codes linked to selected medical clinic for Referral being entered/edited
- PAS 3.2.10.3.2.17-2.0..... allow an authorized CHCS user to delete an appointment detail code linked to selected medical appointment request for Referral being entered/edited
- PAS 3.2.10.3.2.17-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for selected medical appointment request for Referral being entered/edited

PAS 3.2.10.3.2.18.....Referral Booking

- PAS 3.2.10.3.2.18-1.0..... display appointment duration and detail codes linked to selected medical appointment slot on Referral Booking screen
- PAS 3.2.10.3.2.18-2.0..... allow an authorized CHCS user to delete an appointment detail code linked to selected medical appointment slot on Referral Booking screen
- PAS 3.2.10.3.2.18-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for selected medical appointment slot on Referral Booking screen
- PAS 3.2.10.3.2.18-4.0..... allow an authorized CHCS user to change appointment type for selected medical appointment slot on Referral Booking screen

PAS 3.2.10.3.2.19.....Non Enrolled Booking

- PAS 3.2.10.3.2.19-1.0..... display appointment duration and detail codes linked to selected medical appointment slot on Non Enrolled Appointment Booking screen
- PAS 3.2.10.3.2.19-2.0..... allow an authorized CHCS user to delete an appointment detail code linked to selected medical appointment slot on Non Enrolled Appointment Booking screen
- PAS 3.2.10.3.2.19-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for selected medical appointment slot on Non Enrolled Appointment Booking screen
- PAS 3.2.10.3.2.19-4.0..... allow an authorized CHCS user to change appointment type for selected medical appointment slot on Non Enrolled Booking screen

PAS 3.2.10.3.2.20.....Non MTF Booking

- PAS 3.2.10.3.2.20-1.0..... display appointment duration and detail codes linked to selected medical appointment slot on Non MTF Appointment Booking screen
- PAS 3.2.10.3.2.20-2.0..... allow an authorized CHCS user to delete an appointment detail code linked to selected medical appointment slot on Non MTF Appointment Booking screen
- PAS 3.2.10.3.2.20-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for selected medical appointment slot on Non MTF Appointment Booking screen

PAS 3.2.10.3.2.21.....Non MTF Log Report

- PAS 3.2.10.3.2.21-1.0..... display/print as output the appointment detail codes linked to Non MTF appointments when an authorized CHCS user elects to display/ print Non MTF Log Report for specified date range

PAS 3.2.10.3.2.22.....Self-Referral Appointment Booking

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- PAS 3.2.10.3.2.22-1.0..... allow an authorized CHCS user to search for available appointment slots in specialty care clinic allowing self-referrals upon patient request
- PAS 3.2.10.3.2.22-2.0..... allow an authorized CHCS user to search for available medical appointment slots by appointment type and/or appointment detail codes in specialty care clinic allowing self-referrals
- PAS 3.2.10.3.2.22-3.0..... display appointment duration and detail codes linked to the available specialty care appointment slot in Self-Referral Appointment Display List
- PAS 3.2.10.3.2.22-4.0..... allow an authorized CHCS user to change appointment type for selected specialty care appointment slot on Self-Referral Appointment screen
- PAS 3.2.10.3.2.22-5.0..... display the appointment duration and detail codes linked to selected specialty care appointment slot on Self-Referral Appointment screen
- PAS 3.2.10.3.2.22-6.0..... allow an authorized CHCS user to delete an appointment detail code linked to selected specialty care appointment slot on the Self-Referral Appointment screen
- PAS 3.2.10.3.2.22-7.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for selected specialty care 1 appointment slot on the Self-Referral Appointment screen
- PAS 3.2.10.3.2.22-8.0..... allow an authorized CHCS user to enter reason for self-referral appointment

PAS 3.2.10.3.2.23.....Self-Referral Appointment Booking Report

- PAS 3.2.10.3.2.23-1.0..... allow an authorized CHCS user to display/print list of all scheduled appointments in specialty care clinics allowing self-referrals for a specified date range
- PAS 3.2.10.3.2.23-2.0..... allow an authorized CHCS user to generate Self-Referral Appointment Booking Report by division, clinic, provider, and patient
- !
- !

PAS 3.2.10.3.2.24.....Wait List Request option

- PAS 3.2.10.3.2.24-1.0..... display all appointment detail codes linked to selected medical clinic or appointment slot for Wait List Request being entered/edited
- PAS 3.2.10.3.2.24-2.0..... allow an authorized CHCS user to delete an appointment detail code linked to selected Wait List Request being entered/edited
- PAS 3.2.10.3.2.24-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for selected Wait List Request being entered/edited

PAS 3.2.10.3.2.25.....Wait List Processing option

- PAS 3.2.10.3.2.25-1.0..... display appointment detail codes linked to selected Wait List Request being processed
- PAS 3.2.10.3.2.25-2.0..... allow an authorized CHCS user to delete the appointment detail code linked to selected Wait List Request being processed
- PAS 3.2.10.3.2.25-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for selected Wait List Request being processed

PAS 3.2.10.3.2.26.....Cancel By Facility option

- PAS 3.2.10.3.2.26-1.0..... display appointment detail codes linked to facility cancelled appointment being rescheduled
- PAS 3.2.10.3.2.26-2.0..... allow an authorized CHCS user to delete an appointment detail code linked to facility cancelled appointment being rescheduled
- PAS 3.2.10.3.2.26-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for facility cancelled appointment being rescheduled

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PAS 3.2.10.3.2.27.....Cancel By Patient

- PAS 3.2.10.3.2. 27-1.0..... display appointment detail codes linked to appointment being rescheduled by patient
- PAS 3.2.10.3.2. 27-2.0..... allow an authorized CHCS user to delete an appointment detail code linked to appointment being rescheduled by patient
- PAS 3.2.10.3.2. 27-3.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for appointment being rescheduled by patient

PAS 3.2.10.3.2.28.....Join Appointment Slots

- PAS 3.2.10.3.2. 28-1.0..... allow an authorized CHCS user to change appointment type for newly joined medical appointment slot on Single Patient Browse – Change screen
- PAS 3.2.10.3.2. 28-2.0..... display the appointment detail codes linked to newly joined medical appointment slot on Single Patient Browse – Change screen
- PAS 3.2.10.3.2. 28-3.0..... allow an authorized CHCS user to delete an appointment detail code for newly joined medical appointment slot on Single Patient Browse – Change screen
- PAS 3.2.10.3.2. 28-4.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for newly joined medical appointment slot on Single Patient Browse – Change screen

PAS 3.2.10.3.2.29.....Split Appointment Slot

- PAS 3.2.10.3.2. 29-1.0..... allow an authorized CHCS user to change appointment type for newly split medical appointment slot on Single Patient Browse – Change screen
- PAS 3.2.10.3.2. 29-2.0..... display all appointment detail codes linked to newly split medical appointment slot on Single Patient Browse – Change screen
- PAS 3.2.10.3.2. 29-3.0..... allow an authorized CHCS user to delete an appointment detail code linked to newly split medical appointment slot on Single Patient Browse – Change screen
- PAS 3.2.10.3.2. 29-4.0..... allow an authorized CHCS user to select up to 3 appointment detail codes for newly split medical appointment slot on Single Patient Browse – Change screen

PAS 3.2.10.3.2.30Operational Forces (PCM Booking)

- PAS 3.2.10.3.2.30-1.0..... allow an authorized CHCS user capability to book primary care appointments for an Operational Forces enrollee to any provider associated with any MCP Group and/or DMIS ID to which the Operational Forces enrollee's assigned PCM is also associated

PAS 3.2.10.3.2.31.....HL7 Messages (all requirements for the NCA have been deleted because of the NCA Consolidation Project)

PAS 3.2.10.3.2.32.....Appointment Detail Code Change Reasons (requirement deleted per customer request)

PAS 3.2.10.3.2.33.....Appointment Detail Code Schedule Utilization Report

- PAS 3.2.10.3.2.33-1.0..... allow an authorized CHCS user capability to generate an Appointment Detail Code Schedule Utilization Report for a specified division, clinic, or provider

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4.0 Functional Design

4.1 PAS 097351 PAS Profiles and File/ Table Build POC: Jane Barron

A. Functional Overview

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Patient Appointment and Scheduling (PAS) Profiles and the PAS File and Table modules will be modified to allow an authorized CHCS user the capability to:

- Indicate that a specified appointment in the Appointment Type file is a medical appointment type that may be used by all medical clinics in the MTF
- Add non-standard appointment detail codes to the Appointment Detail Codes file
- Modify non-standard appointment detail codes in the Appointment Detail Codes file
- Inactivate any non-standard appointment detail code in the Appointment Detail Codes file.
- Link appointment detail codes to the clinic in a medical clinic profile.
- Delete any appointment detail code linked to the clinic in a medical clinic profile.
- Enter self-referral indicator for a specified medical clinic.

It should also be noted that the following appointment detail codes would be added to the Appointment Detail Codes file as standard beneficiary priority appointment detail codes:

BPAD	Active Duty Only
BPPR	Prime
BPGME	Graduate Medical Education
BPAD	No Active Duty
BPAD	No Prime
BPAD	No Active Duty, No Prime

In addition to the current standard procedure appointment detail codes and the new standard beneficiary priorities, the sites will be able to define their own 'age restriction' appointment detail codes and any other detail codes. New detail codes should be coordinated at the regional level to standardize detail codes across a region and prevent duplicate detail codes within the region.

The system requires that the following appointment types be maintained as standard appointment types in the Appointment Type file:

- T-CON* Telephone Consult Non-searchable Appointment Type.

This non-searchable appointment type must be added to an individual provider's Provider Profile and the provider must be a User in the User file before telephone consults may be entered for the specified provider.

- N-MTF Non-MTF Appointment Type.

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This appointment type must be added to the Non-MTF Place of Care (Clinic) profile and to the individual provider profiles for each provider linked to that non-MTF place of care. When a HCF logs a non-MTF appointment, the system will automatically populate the appointment type field with the N-MTF appointment type.

- APV Ambulatory Patient Visit

This appointment type is used for outpatient same day surgery visits in all clinics with a location type of S for same day surgery.

B. Functional Dependencies

1. Sites will need to perform MCP file & table builds necessary in order to utilize MCP.
2. As part of the Installation, the system will run the conversion to set the new Standard Appt Type flag in the Appointment Type file to YES for the standardized appointment types.
3. PAS Scheduling Supervisors tasked to create and maintain medical clinic profiles, must have the new SD APPT STAND security key. This security key will allow the Scheduling Supervisor to enter/edit Detail Codes linked to a specified clinic in the PAS module on CHCS.
4. The new Appointment Detail Codes file must be populated with the site definable 'age restriction' detail codes before those codes may be utilized in MCP.
5. In order to access the Self-Referral Booking in MCP, the specified clinic must have the new Self-Referrals Allowed flag set to YES in the Clinic Profile for the specified clinic.
6. No change will be made to the Access to Care (ATC) functionality. The appointment booking clerks will still be required to enter an ATC category prior to searching for available appointment slots.
7. If the authorized user enters site definable security keys in the Booking Authority, Change Appt Change Authority and/or Overbook Authority fields for one or more standard appointment types in either the Clinic or Provider Profiles, the authorized user must assign those same site definable security keys to the appropriate booking clerks so they may split and join slots, change appointment type, add, delete or modify detail codes, and enter appointment change reason.

C. Business Rules

1. The standard appointment types and descriptions may be viewed but not modified via the APRO Appointment Type Enter/Edit option on the PAS Profiles menu in CHCS.
2. The standard detail codes and descriptions may be viewed but not modified via the DFIL Appointment Detail Codes Enter/Edit option on the PAS File and Table Maintenance menu in CHCS.
3. Standard Appointment Types and Detail Codes will be maintained via the CHCS Standard Table Update Process quarterly. However, initially the sites may request a monthly update as needed until the entries in the file are stabilized.
4. If the Self-Referrals Allowed field is set to YES in a Clinic Profile, the authorized user will be required to populate the Clinic Specialty field in the Clinic profile as well. If multiple clinic specialties are entered for a clinic, which allows self-referrals, the system will prompt the authorized user to select the appropriate clinic specialty when booking the self-referral. The clinic specialty is required so that a system-generated referral may be created in the MCP Referral file.
5. The Medical Appt Type flag in the Appointment Type file must be set to YES before the specified appointment type may be utilized in MCP.

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D. Workflow

Appointment Type Profile Enter/Edit [PAS 3.2.10.3.2.2-1.0]

1. MENU PATH: C=>PAS=>S=>PROF=>APRO
2. As soon as an authorized user [e.g., Scheduling Supervisor] select the Appointment Type Profile Enter/Edit (APRO) option from the Profiles menu in PAS, the system displays the Select APPOINTMENT TYPE prompt.
3. When the authorized user enters an appointment type (e.g., PCM, ROUT), the system displays the SD Appt Type screen (refer to Screen 1).

```
===== Start Screen 1: =====
Appointment Type: WELL                                     SD APPT TYPE

                Name: WELL [Display Only]
            Description: WELLNESS/HEALTH APPT [Display Only]
Are Appt Slots Searchable?: YES
                Status: ACTIVE
                Category: INITIAL
            Uneditable: YES [Display Only]
        Medical Appt Type: YES
```

Press RETURN to continue

```
===== End Screen 1: =====
```

4. The system will allow the authorized user to view the standard Appointment Type data but not modified it.
5. A new 'Medical Appt Type' field is being added to the Appointment Type Profile for this software release. A conversion will be run during the software installation process to automatically set this new field to YES for each standard appointment type, as defined in Phase 1(e.g., PCM, PCM\$).
6. An authorized user with the SD APPT STAND security key may add new appointment types to the Appointment Type file using the Appointment Type Enter/Edit option. When the authorized user enters a new appointment type, the system displays the 'Are you adding [Appt Type] as a new APPOINTMENT TYPE? Y//'.
7. If the authorized user accepts the default, the system displays the SD Appt Type screen (refer to Screen 1) and allows the authorized user to enter and file the appropriate appointment type data.
8. It should be noted that the Medical Appt Type field should be set to NO for all non standard Dental appointment types in dental clinics that have a Location Type of "D" (Dental) and where the DDSA software is being used for appointment booking When creating or editing schedules and templates for these Dental clinics, the software will screen out all appointment types with the Medical Appt Type set to Yes at the Select Appt Type field. . All other medical clinics and any Dental clinic with a Location type of "C" (Clinic) using the PAS software for appointment booking must have the Medical Appt Type field set to YES.

Appointment Detail Codes Enter/Edit [PAS 3.2.10.3.2.3-1.0, PAS 3.2.10.3.2.3-2.0, PAS 3.2.10.3.2.3-3.0]

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1. MENU PATH: C=>PAS=>S=>FILE=>DFIL
2. A new option, Appointment Detail Codes Enter/Edit, will be added to the PAS File/Table Maintenance Menu in PAS (refer to Screen 1)

===== Start Screen 1: =====

AFIL Activate/Inactivate Clinic Provider
CFIL Create A New Clinic
EFIL Enter/Edit MEPRS Codes/COST POOL Codes
MFIL Method of Transit Enter/Edit
OFIL Outpatient Disposition Enter/Edit
PFIL PAS Mailer Menu
DFIL Appointment Detail Codes Enter/Edit

BFIL Booking Service Type Enter/Edit
SFIL Schedule Modification Reason Enter/Edit
TFIL Trackable Entity Enter/Edit
WFIL Wait List Priority Enter/Edit
XFIL Activate/Inactivate Treatment Room

Select File/Table Maintenance Menu Option: DFIL Appointment Detail Codes Enter/Edit

===== End Screen 1: =====

3. As soon as the authorized user selects the Appointment Detail Codes Enter/Edit option from the PAS File/Table Enter/Edit option, the system will display the Select APPOINTMENT DETAIL CODE prompt.
4. If the authorized user enters a standard detail code, the system will automatically display the Appointment Detail Code screen for the appointment detail code entered. The authorized user will be allowed to view but not edit the data previously entered except to change status to Inactive (refer to Screen 2).

===== Start Screen 2: =====

APPOINTMENT DETAIL CODE: BK

Code:	BK
Description:	BACK PAIN OR PROBLEM
Uneditable:	YES
Status:	ACTIVE

Press RETURN to continue

===== End Screen 2: =====

5. The system will allow an authorized user to enter new appointment detail codes (e.g., site definable 'age restriction' detail codes).

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6. As soon as a new detail code is entered, the system will display the [Detail Code] Are you adding [Detail Code] as a new APPOINTMENT DETAIL CODE? Y prompt. If the authorized user accepts the default to add the new detail code, the system will display the Appointment Detail Code screen and allow the user to enter and file the new site definable “age restriction “appointment detail code data or other new detail codes coordinated at the regional level (refer to Screen 2).
7. As soon as the authorized user files the data, the system will allow an authorized user to link that newly entered appointment detail code to a clinic pick list, a schedule slot or an appointment.

Clinic Profile Edit

[PAS 3.2.10.3.2.4-1.0, PAS 3.2.10.3.2.4-2.0 PAS 3.2.10.3.2.4-3.0 PAS 3.2.10.3.2.4-4.0]

1. MENU PATH: C=>PAS=>S=>PROF=>CPRO
2. As soon as an authorized user selects to edit the Clinic Profile for a medical clinic, the system displays the Select CLINIC prompt.
3. Once the authorized user has entered the appropriate clinic name and pressed ‘RETURN’ to continued, the system displays the SD CLINIC PROFILE screen (refer to Screen 1).

```
===== Start Screen 1: =====
HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO                               SD CLINIC PROFILE

      Name: PRIMARY CARE CLINIC - NO
      Abbreviation: PCCNO
      Facility: NBMC NAVSTA SEWELLS
      Division: NAVY OUTPATIENT DIVISION
      Building Name:
      Building Number:
      Street Address:
              ZIP: 23708
              City: PORTSMOUTH
              State: VIRGINIA
      Clinic Location:
      Clinic Availability:
      Telephone:
      Enrollee Lockout: NO
      Type of Care:
              Service: PRIMARY CARE DEPARTMENT
              Department: PRIMARY CARE DEPARTMENT
      MEPRS Code: BHAA
```

```
===== End Screen 1: =====
```

4. Two new fields have been added to the Clinic Profile. They are:

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Self-Referrals Allowed: (refer to Screen 2)
Clinic Detail Codes: (refer to Screen 4)

===== Start Screen 2: =====
HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO SD CLINIC PROFILE CONT

Wait List Activated: NO	Maximum Wait List Days:	day(s)
Wait List Provider Mandatory:	Wait List Hold Duration:	day(s)
Auto Wait List Processing:	Schedule Hold Duration:	2 day(s)
Prompt for Requesting Service: NO	Patient Record Pull:	1 day(s)
Clinic Type: COUNT	Radiology Record Pull:	2 day(s)
Check Holiday File: YES	Roster Production:	1 day(s)
Cost Pool Code:	Prepare Reminder Notice:	10 day(s)
Activation Status: ACTIVATED	Available Schedule:	30 day(s)

Access to Care Reporting: YES
Self-Referrals Allowed: YES
Clinic Appt Instructions:

===== End Screen 2: =====

5. If the authorized user sets the Self-Referrals Allowed: field to YES, then the system will allow a booking clerk to book specialty care appointments for patients without PCM referrals in the specified clinic.
6. If the authorized user sets the Self-Referrals Allowed flag to YES, the system will require the authorized user to populate the Clinic Specialty field (refer to Screen 3).

===== Start Screen 3: =====
HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO SD CLINIC PROFILE -- CONTINUATION

Select CLINIC SPECIALTY:
FAMILY PRACTICE/PRIMARY CARE

===== End Screen 3: =====

7. The Clinic Specialty field is required so that when a Self-Referral is entered via the Self-Referral Booking option, the system will automatically populate the specialty field without having to prompt the user. If multiple clinic specialties are entered, the system will then prompt the user for the appropriate clinic specialty to link to the self-referral (refer to the Self-Referral Booking option in this document).
8. Once the authorized user has entered the appropriate data in the Clinic Specialty field, the system will prompt the authorized user to enter the clinic Detail Codes pick list for the specified clinic (refer to Screens 4 and 5).

===== Start Screen 4: =====

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Detail Codes:

??

Enter APPOINTMENT DETAIL CODE or DESCRIPTION to appear on this
Clinic's most frequently used appointment detail codes pick list for outpatient encounters.

Answer with APPOINTMENT DETAIL CODE, or DESCRIPTION, or
(M)ore help, (L)ist of values, or (Q)uit? L

Keyboard Help = PF1,HELP

===== End Screen 4: =====

===== Start Screen 5: =====

Detail Codes:

P,,,T

Choose from:

ADHD	Attention Deficit and Hyperactivity Disorder or Attention Deficit Disorder
ANGER	Anger management education - no PCM referral required
ASTHMA	Asthma evaluation or education appointments
BCP	Birth Control
BEPC	Birth and Early Parenting Class
BF	Weight exceeding body fat standards
BFC	Breast Feeding Class
* BK	Back pain or problem
BTL	Bilateral Tubule Ligation
+ CHOL	Cholesterol

Make choice = SELECT ,,,,,,,,,,,,,,,,,, **Exit = F10** ,,,,,,,,,,,,,,,,,

===== End Screen 5 : =====

===== Start Screen 6: =====

HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO SD CLINIC PROFILE CONT

Detail Codes: [multiple]

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BK

BK BACK PAIN OR PROBLEM Are you adding 'BK BACK PAIN OR PROBLEM' as a new CLINIC APPOINTMENT DETAIL CODE (the 1st for this HOSPITAL LOCATION) ? Y

===== End Screen 6: =====

9. The authorized user is not required to enter the most commonly used clinic appointment detail codes to be used either when creating templates, creating schedules, or booking appointments. If no appointment detail codes are entered in the specified clinic profile, the system will display a complete list of all appointment detail codes at the Appointment Detail Code field when creating templates/schedules and/or booking appointments.
10. If the authorized user elects to enter a detail code for the specified clinic pick list, the system will display 'Are you adding [detail code] as a new CLINIC APPOINTMENT DETAIL CODE (the 2ND for this HOSPITAL LOCATION)? Y'.
11. As soon as the authorized user accepts the default to add the detail code to the pick list, the system adds the appointment detail code to the clinic pick list. It should be noted that the authorized user might also delete an entry from the clinic pick list by positioning the cursor next to the appointment detail code entry and pressing the DELETE key. The system will then prompt the authorized to verify the deletion prior to deleting the entry from the clinic pick list.

===== Start Screen 7: =====

HOSPITAL LOCATION: PRIMARY CARE CLINIC - NO SD CLINIC PROFILE -- CONTINUATION

Select APPOINTMENT TYPE:

ACUT
PCM
PCMS
ROUT
WELL

===== End Screen 7: =====

12. Once the authorized user has entered/edited the Clinic Appointment Detail Code pick list, the system allows the authorized user to enter/edit the clinic appointment types. Once the clinic profile data is filed, the clinic appointment detail codes pick list may be used when creating templates/schedules and/or booking appointments.

4.2 PAS 097352 Templates

POC: Jane Barron

[PAS 3.2.10.3.2.7-1.0, PAS 3.2.10.3.2.7-2.0]

A. Functional Overview

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Patient Appointment and Scheduling (PAS) Templates module will be modified to allow an authorized CHCS user to the capability to:

- Select up to 3 appointment detail codes for any appointment slot being added to or edited in a daily template for a provider in a medical clinic.
- Modify the appointment type duration when creating/editing a daily template for a provider in a medical clinic.

B. Functional Dependencies

1. Appointment detail codes must be in the Appointment Detail Codes file (e.g., 'age restriction' appointment detail codes) before they can be linked to template slots.
2. The clinic appointment detail code pick list should be populated before it can be access from the Template options. If no clinic appointment detail code pick list is created, the system will display the complete list of all current appointment detail codes to user when queried from the Templates options.
3. When entering or editing detail codes in a daily template, the authorized user may select appointment detail codes from the clinic pick list or the complete master list.

C. Business Rules

1. An authorized user may select up to three appointment detail codes to link to an individual template schedule slot when creating or editing a daily template.
2. An authorized user may delete any appointment detail code linked to an individual template schedule slot when creating or editing a daily template.
3. The appointment type duration for a daily template schedule slot may be modified when creating or editing a daily template.
4. The appointment slot duration may be entered in 1minute increments.
5. When creating a daily template, the system will default the duration of the appointment type selected from the specified provider's profile but will allow the authorized user to modify the duration.
6. When editing a daily template, if the authorized user selects an appointment schedule slot to modify, the system will allow the authorized user to change the duration. The new duration for the appointment schedule slot selected may not overlap an existing schedule slot (e.g., User attempts to change duration of 'Mon 0900 PCM' from 30 minutes to 60 minutes when a 'Mon 0930 appointment schedule slot has already been created for the specified daily template.). If the authorized user attempts to file the daily template and a duration conflict exist, the system will notify the authorized user that an overlapping schedule slot exists. The system will redisplay the Daily Template and allow the user to edit the appropriate schedule slot.
7. If the authorized user selects multiple daily template schedule slots with the identical data elements to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comment), the system allows the user to enter the schedule slot data once for all the schedule slots selected. When the daily template is filed, the system will apply the updates to all the schedule slots selected.
8. If an authorized user selects multiple daily template schedule slots to edit that are not identical, the system will allow the user to modify the schedule slot data slot by slot, until all the selected schedule slots have been processed.
9. When the authorized user files the data for the multiple schedule slots selected, the system will verify that the total duration for the slots selected does overlap any existing daily template schedule slot.
10. Only those appointment types that have the Medical Appt Type flag set to YES in the Appointment Type file may be added to a daily template.

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D. Workflow

Create/Edit Templates [PAS 3.2.10.3.2.7-1.0 PAS 3.2.10.3.2.7-2.0]

1. MENU PATH: C=>PAS=>S=>TEMP=>CTEMP
2. Once an authorized user has elect to create/edit a daily template, the system will prompt the authorized user for clinic, provider and daily template ID (refer to Screen 1).

===== Start Screen 1: =====

Create/Edit Daily Template

Select CLINIC: PRIMARY CARE CLINIC CLINIC NAVY OUTPATIENT DIVISION

Select PROVIDER: FROST,ROBERT FROST,ROBERT 099-32-1234
OK? YES// (YES)

Select Daily TEMPLATE ID: MON PCC FROST
Are you adding 'MON PCC FROST' as a new SCHEDULE TEMPLATE? Y (YES)

===== End Screen 1: =====

3. If the authorized user enters the name of a new daily template, the system will display the prompt 'Are you adding [Daily Template ID] as a new Schedule Template? Y'.
4. If the authorized user verifies that a schedule template is being added, the system displays the Create/Edit Template screen (refer to Screen 2).
5. If the authorized user responds to the prompt, the system will redisplay the Select Daily TEMPLATE ID prompt and allow the authorized user to reenter the Daily TEMPLATE ID (refer to Screen 1).
6. If the authorized user enters an existing Daily TEMPLATE ID, the system will display the CREATE/EDIT DAILY TEMPLATE screen and action bar and allow the user to view and edit the selected daily template (refer to screen 5).

===== Start Screen 2: =====

Create/Edit Daily Template SD CREATE/EDIT DAILY TEMPLATE

Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT

Day of Week: MONDAY
Template ID: MON PCC FROST
Description: RTN

Filing ...

===== End Screen 2: =====

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7. Prior to entering the individual schedule slot data, the system allows the authorize user to enter the day of the week for which the daily template is being created, to update the template ID, and to enter a brief description of the daily template. All three fields are required. Once the data has been entered, the system allows the authorized user to enter data for the individual schedule slots in the template being created/edited (refer to Screen 3).

===== Start Screen 3: =====
Create template for MONDAY SD CREATE/EDIT DAILY TEMPLATE

Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT

Start time: 0700
Stop time:
Number of slots: 10
Appointment Type: PCM
Slot Duration: 30 minutes
Max # of Patients per Slot: 1
Detail Codes:

PE
BPAD

Slot comment: SLOT COMMENT XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

===== End Screen 3: =====

8. The system displays the name of the clinic and provider the daily template is being created for at the top of the SD Create/Edit Template screen. The authorized user may then enter Start Time and either Stop Time or the Number of Slots being created/edited.
9. Once the daily template time range or number of slots has been enter, the system allows the authorized user to enter the Appointment Type to be used. The system automatically defaults the duration of the Appointment Type entered in the Duration field and allows the authorized user to edit the duration for the appointment type selected. The original duration displayed is the duration of the specified appointment type in the selected provider's Provider Profile.
10. As soon as the authorized user accepts the default duration of the selected appointment type or enters a new appointment type duration, the system allows the user to enter the maximum # of patients per slot for the selected time range or number of slots being created/edited at this time.
11. After the Max # of Patients per Slot has been entered, the system allows the authorized user to link up to 3 appointment detail codes for each template schedule slot being created/edited.
12. If the specified clinic maintains a clinic appointment detail code pick list, the system will allow the authorized user to select the appropriate appointment detail codes first from the clinic pick list and/or from the entire Appointment Detail Codes file by entering '??' in the Detail Codes field.
13. If the authorized user does not select an appointment detail code from the clinic pick list, the system will prompt the authorized to view the entire appointment detail codes list for possible selection prior to returning to the SD Create/Edit Template screen.
14. The Detail Codes field is not a required field. If the authorized user wishes to delete a previous entered detail code, the authorized user need only position the cursor next to the Detail Codes entry and press the 'DELETE' key. The system will display the 'Do you want to 'delete' this entry?' prompt prior to deleting the entry. If the user responds Yes to the prompt, the previously entered appointment detail code will be deleted.

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15. Once the authorized user has entered the appointment detail codes for the template schedule slot/s being entered/edited or pressed 'RETURN' to continued, the system will allow the authorized user to enter a slot comment for the slot/s being entered/edited.
16. As soon as the authorized user either enters a slot comment or presses the 'RETURN' key to continue, the system displays the data just entered and prompts the authorized user to verify that it is 'OK to add these slots to [day]? Yes/' (refer to Screen 4).

===== Start Screen 4: =====

Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT
Day: Monday

Start Time	Appt Type	# per Slot	Dur	Detail Codes	Slot Comment
0700	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
0730	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
0800	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
0830	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
0900	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
0930	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
1000	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
1030	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
1100	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX
1130	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXX

Press <RETURN> to continue

Ok to add these slots to Monday? Yes//

Complete for Monday? No//Y

Display the completed template for Monday? Yes//N

===== End Screen 4: =====

17. If the authorized user responds No to the 'OK to Add' prompt, the system redisplay the SD CREATE/EDIT TEMPLATE screen (refer to Screen 3) and allows the authorized user to edit the data just entered.
18. If the authorized user accepts the default to add these slots to Monday, the system then prompts the user to verify that the daily template for Monday is complete.
19. If the authorized user accepts the default that the daily template is not complete, the system will redisplay the SD CREATE/EDIT TEMPLATE screen (refer to Screen 3) and allows the authorized user to enter new template schedule slots for the specified daily template (refer to Screen 3)
20. If the authorized user responds YES to the 'Complete for [day]? Prompt, the system will file the daily template data and then prompt the authorized user to display the completed schedule for [day].
21. Once the authorized user has viewed the completed daily template schedule or elected not to display the daily template schedule, the system will display the Create/Edit Daily Template screen and action bar for the newly created template (refer to Screen 5).

===== Start Screen 5: =====

CREATE/EDIT DAILY TEMPLATES

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Template ID: MON PCC FROST
Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT
Day: Monday

Start Time	Appt Type	# per Slot	Dur	Detail Codes	Slot Comment
0700	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0730	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0800	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0830	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0900	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0930	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX

Select (A)dd slots, (D)delete slots, (M)odify slots, (V)iew slots, or (Q)uit: A// Q

===== End Screen 5: =====

22. The system allows the authorized user to add additional template schedule slots, delete previously added template schedule slots, modify existing template schedule slots and view the daily template in its entirety.
23. When the authorized user selects either (D)delete slots from the Create/Edit Templates action bar, the system will position the cursor in the middle window and allow the authorized user to select the daily template schedule slots to delete. Once the slot/s has been selected and the authorized user has pressed 'RETURN' to continue, the system displays the 'OK to delete slots? N// ' prompt and allows the authorized user to accept the default or elect to delete the selected slots..
24. When the authorized user selects either the (A)dd slots action or has selected a slot to edit, the system will display the SD Create/Edit Template screen (refer to Screen 3) and allow the authorized user to add slots or edit the previously selected slot.
25. If the authorized user selects (M)odify slots, the system will the system will position the cursor in the middle window and allow the authorized user to select the daily template schedule slots to modify.
26. Once the authorized user has selected one or more schedule slots to modify, the system will redisplay the SD CREATE/EDIT DAILY TEMPLATE screen (refer to Screen 3) and allow the authorized user to modify the appropriate schedule slot data.
27. When editing a daily template, if the authorized user selects an appointment schedule slot to modify, the system will allow the authorized user to change the duration. The new duration for the appointment schedule slot selected may not overlap an existing schedule slot (e.g., User attempts to change duration of 'Mon 0900 PCM from 30 minutes to 60 minutes when a 'Mon 0930 PCM' schedule slot has already been created for the specified daily template.). If the authorized user attempts to file the daily template and a duration conflict exist, the system will notify the authorized user that an overlapping schedule slot exists. The system will redisplay the Daily Template and allow the user to edit the appropriate schedule slot.
28. If the authorized user selects multiple daily template schedule slots with the identical data elements to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comment), the system allows the user to enter the schedule slot data once for all the schedule slots selected. When the daily template is filed, the system will apply the updates to all the schedule slots selected.
29. If an authorized user selects multiple daily template schedule slots to edit that are not identical, the system will allow the user to modify the schedule slot data slot by slot, until all the selected schedule slots have been processed.

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30. When the authorized user files the data for the multiple schedule slots selected, the system will verify that the total duration for the slots selected does overlap any existing daily template schedule slot.

4.3 PAS 097353 Schedules

POC: Jane Barron

A. Functional Overview

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Patient Appointment and Scheduling (PAS) Schedules module will be modified to allow an authorized CHCS user to the capability to:

- Select up to 3 appointment detail codes for any appointment slot being added to or edited in a schedule for a provider in a medical clinic.
- Modify the appointment type duration when creating/editing a schedule for a provider in a medical clinic.

B. Functional Dependencies

1. Appointment detail codes must be in the Appointment Detail Codes file (e.g., 'age restriction' appointment detail codes) before they can be linked to schedule slots.
2. The clinic appointment detail code pick list should be populated before it can be access from the Schedule options. If no clinic appointment detail code pick list is created, the system will display the complete list of all current appointment detail codes to user when queried from the Schedule options.
3. When entering or editing detail codes in a schedule, the authorized user may select appointment detail codes from the clinic pick list or the complete master list.

C. Business Rules

1. An authorized user may select up to three appointment detail codes to link to an individual schedule slot when creating or editing a schedule.
2. An authorized user may delete any appointment detail code linked to an individual schedule slot when creating or editing a schedule.
3. The appointment type duration for a schedule slot may be modified when no template is used to create a schedule or when a schedule is being edited.
4. When editing a schedule, if the authorized user selects an appointment schedule slot to modify, the system will allow the authorized user to change the duration. The new duration for the appointment schedule slot selected may not overlap an existing schedule slot (e.g., User attempts to change duration of 'Mon 0900 PCM' from 30 minutes to 60 minutes when a 'Mon 0930 PCM' schedule slot has already been created.). If the authorized user attempts to file the schedule updates and a duration conflict exist, the system will notify the authorized user that an overlapping schedule slot exists. The system will redisplay the SD CREATE/EDIT SCHEDULE screen and allow the user to edit the appropriate schedule slot.
5. If the authorized user selects multiple daily schedule slots with identical data elements to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comment), the system allows the user to enter the schedule slot data once for all the schedule slots selected. When the schedule is filed, the system will apply the updates to all the schedule slots selected.
6. If an authorized user selects multiple daily schedule slots to edit that are not identical, the system will allow the user to modify the schedule slot data slot by slot, until all the selected schedule slots have been processed.
7. When the authorized user files the data for the multiple schedule slots selected, the system will verify that the total duration for the slots selected does overlap any existing schedule slots.
8. Only those appointment types that have the Medical Appt Type flag set to YES in the Appointment Type file may be added to a schedule.

D. Workflow

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Create Schedules

[PAS 3.2.10.3.2.9-1.0, PAS 3.2.10.3.2.9-2.0, PAS 3.2.10.3.2.9-3.0]

1. MENU PATH: C=>PAS=>S=>SCHE=>CSCH
2. If an authorized user elects to create a schedule, the system will prompt the user to enter clinic, provider, and date range for the schedule being created (refer to Screen 1).

===== Start Screen 1: =====

Create Schedules

Select CLINIC: PRIMARY CARE CLINIC

Select PROVIDER: FROST,ROBERT

Enter SCHEDULE START DATE: 07 Jun 2000// 07AUG (07 Aug 2000)

Enter SCHEDULE END DATE: 07 Aug 2000// (07 Aug 2000)

Use templates to create schedules? Yes//

Select Template ID: MON PCC FROST DAY MONDAY

Display template? Yes//

===== End Screen 1: =====

3. Once the schedule date range is entered, the system will display the 'Use templates to create schedules? Yes//' prompt. If the authorized user responds No to the prompt, the system will display the SD Create/Edit Schedules screen (refer to Templates UDF, Screen 3) and allow the authorized user to create a new schedule for the specified clinic, provider and schedule date range.
4. If the authorized user elects not to use a template to create a schedule, the system will display the SD CREATE/EDIT SCHEDULE screen (refer to Screen 5). The system will then allow the authorized user to enter Start Time, Stop Time or Number of slots, Appointment Type, Slot Duration, Maximum number of patients per slot, Appointment Detail Codes, and Slot Comment . Once the authorized user files the schedule, the system will prompt the authorized user if it is "OK to Add Slots to the schedule". Once the schedule slots have been added and/or edited, the system will allow the authorized user to add additional schedule slots to the schedule or file the completed schedule. If the authorized user elects to file the schedule, the system will display the CREATE SCHEDULE screen (refer to Screen 3) and allow the authorized user to file the completed schedule.
5. If the authorized user accepts the default to use a template to create the new schedule, the system will prompt the user to select the Template ID to use to create the schedule (refer to screen 1).
6. Once the Template ID has been entered, the system will prompt the user to display the template that will be used to create the schedule.
7. If the user accepts the default, the system will display the template (refer to Screen 2).

===== Start Screen 2: =====

Template ID: MON PCC FROST

Clinic: PRIMARY CARE CLINIC

Provider: FROST,ROBERT

Day of Week: Monday

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Start Time	Appt Type	# per Slot	Dur	Detail Codes	Slot Comment
0700	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0730	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0800	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0830	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0900	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
0930	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
1000	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
1030	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
1100	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX
1130	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXXXXXXXXXX

Press <RETURN> to continue

Create schedules for Monday? Yes//

===== End Screen 2: =====

8. The template displayed includes template ID, clinic, provider, day of week the template is for, and for each schedule slot in the template, the start time, appointment type, number of patients per slot, appointment duration, detail codes, if any, and slot comment, if entered.
9. After displaying the template selected for the authorized user review, the system displays the prompt 'Create schedules for [day]? Yes//' prompt.
10. If the authorized user responds No to the prompt, the system will redisplay the Select Clinic prompt (refer to Screen 1) and allow the user to either exit the option or elect to create a new schedule.
11. If the authorized user accepts the default to create a schedule for [day], the system will redisplay the Create Schedules screen (refer to Screen 3).

===== Start Screen 3: =====

Create Schedules

Clinic: PRIMARY CARE CLINIC

Provider: FROST,ROBERT

Week of Sun Mon Tue Wed Thu Fri Sat

06 Aug 2000 X

Is this schedule correct? Yes//

... SCHEDULE IS BEING FILED. PLEASE WAIT ...

< Schedule created for 07 Aug 2000 to 07 Aug 2000 >

Display Schedules? No//Y

Select DEVICE:

===== End Screen 3: =====

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12. The Create Schedules screen displays along with the clinic and provider, the system displays an overview of the schedule being created being with the first week for the schedule date range specified. Each day for which a schedule is being created is marked with an 'X'. The system also displays the prompt 'Is this schedule correct? Yes//'
13. If the authorized user responds No to the prompt, the system redisplay the Create Schedules screen (refer to Screen 1) and allows the authorized user to create a new schedule or exit the option.
14. If the authorized user accepts the default to create the schedule, the system files the schedule and then prompts the user to display the newly created schedule to the appropriate output device (refer to Screen 4).

```
===== Start Screen 4: =====
Navy Outpatient                                30 Jun 2000@1005 Page 1
                                           PROVIDER SCHEDULE
                                           Monday 07 Aug 2000
```

```
Division: NAVY OP
Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT
```

Start Time	Appt Type	Slots/Book	Dur	Detail Codes	Slot Comment	Slot Status
0700	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0730	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0800	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0830	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0900	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0930	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
1000	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
1030	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
1100	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
1130	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----

Select (O)pen schedules, (H)old for future release, (W)ait List: O//

OPEN Schedules

... SCHEDULE IS BEING OPENED. PLEASE WAIT ...

Display Schedules? Yes//N

Press <RETURN> to continue

```
===== End Screen 4: =====
```

15. The system then displays the Create Schedules action bar and allows the authorized user to:
 - (O)pen schedules for appointment booking

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- (H)old schedules for future release
- (W)ait List schedules if the specified clinic maintains a Wait List for appointment booking

16. If the authorized user elects to open the schedules, the system opens the schedule slots and then prompts the authorized user to display the newly created schedule.

Maintain Schedules

[PAS 3.2.10.3.2.11-1.0, PAS 3.2.10.3.2.11-2.0, PAS 3.2.10.3.2.11-3.0]

1. MENU PATH: C=>PAS=>S=>SCHE=>MSCH
2. When the authorized user elects to modify a schedule, the system prompts the authorized user to enter clinic, provider, and schedule date range.
3. Once the data has been entered, the system displays the Modify Schedules screen and action bar with the schedule data displayed in the middle window of the Modify Schedules screen (refer to Screen 1)

```
===== Start Screen 1: =====
Modify Schedules          07 Aug 2000

      Clinic: PRIMARY CARE CLINIC
      Provider: FROST,ROBERT
Dates selected: 07 Aug 2000 (MONDAY) to 07 Aug 2000 (MONDAY)
-----
Start  Appt # per
Time  Type Slot Dur  Detail Codes          Slot Comment
=====
0700  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
0730  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
0800  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
0830  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
0900  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
0930  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
1000  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
1030  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
1100  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
1130  PCM   1   30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXX
=====
Select (M)odify, (A)dd, (D)elete, or (Q)uit: M//

===== End Screen 1: =====
```

4. The system allows the authorized user to:
 - Modify appointment type, duration slot comments, number of patients per slot, and appointment detail codes
 - Add schedule slots to the schedule

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- Delete schedule slots from the schedule
5. If the authorized user elects to modify the schedule, the system positions the cursor in the middle window of the Modify Schedules screen and allows the authorized user to select the schedule slots to modify (refer to Screen 2)

===== Start Screen 2: =====
Modify Schedules 07 Aug 2000

Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT
Dates selected: 07 Aug 2000 (MONDAY) to 07 Aug 2000 (MONDAY)

Start Time	Appt Type	# per Slot	Dur	Detail Codes	Slot Comment
07 Aug 2000 (MONDAY)					
0700	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0730	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0800	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0830	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0900	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
0930	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
1000	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
1030	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX
1130	PCM	1	30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX

=====

Use SELECT KEY to choose up to 100 slots to modify
Selecting the Date selects the entire day
F9 to modify all dates displayed

===== End Screen 2: =====

6. When the authorized user selects the schedule slot/s to be modified and presses the 'RETURN' key, the system displays the prompt 'Create schedules for [day]? Yes/' (refer to Screen 3)

===== Start Screen 3: =====
Modify Schedules 07 Aug 2000

Clinic: PRIMARY CARE CLINIC
Provider: FROST,ROBERT
Dates selected: 07 Aug 2000 (MONDAY) to 07 Aug 2000 (MONDAY)

Start Time	Appt Type	# per Slot	Dur	Detail Codes	Slot Comment
---------------	--------------	---------------	-----	--------------	--------------

07 Aug 2000 (MONDAY)				
0700	PCM	1	30	PE BPAD
0730	PCM	1	30	PE BPAD
0800	PCM	1	30	PE BPAD
0830	PCM	1	30	PE BPAD
0900	PCM	1	30	PE BPAD
0930	PCM	1	30	PE BPAD
1000	PCM	1	30	PE BPAD
1030	PCM	1	30	PE BPAD
1130	PCM	1	30	PE BPAD

===== End Screen 3: =====

- ===== Start Screen 4: =====

SD CREATE/EDIT SCHEDULES

Start time:	0800
Stop time:	0830
Number of slots:	1
Appointment Type:	PCM
Slot Duration:	30 minutes
# of Patients per Slot:	1
Detail Codes:	

OK to DELETE the entire PE PHYSICAL EXAM Entry? N// YES

===== End Screen 4: =====

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9. When editing a schedule, if the authorized user selects an appointment schedule slot to modify, the system will now allow the authorized user to change the duration. The new duration for the appointment schedule slot selected may not overlap an existing schedule slot (e.g., User attempts to change duration of 'Mon 0900 PCM' from 30 minutes to 60 minutes when a 'Mon 0930 PCM' schedule slot has already been created.). If the authorized user attempts to file the schedule updates and a duration conflict exist, the system will notify the authorized user that an overlapping schedule slot exists. The system will redisplay the SD CREATE/EDIT SCHEDULE screen and allow the user to edit the appropriate schedule slot.
10. If the authorized user selects multiple daily schedule slots with identical data elements to edit (i.e., appointment type, duration, detail codes, maximum number of patients, and slot comment), the system allows the user to enter the schedule slot data once for all the schedule slots selected. When the schedule is filed, the system will apply the updates to all the schedule slots selected.
11. If an authorized user selects multiple daily schedule slots to edit that are not identical, the system will allow the user to modify the schedule slot data slot by slot, until all the selected schedule slots have been processed.
12. When the authorized user files the data for the multiple schedule slots selected, the system will verify that the total duration for the slots selected does overlap any existing schedule slots.
13. When the authorized user has edited all the data and pressed the 'RETURN' key to continue, the system redisplay the Modify Schedules screen with the schedule slots updated appropriately and allows the authorized user to either select another action or exit (refer to Screen 5).

===== Start Screen 5: =====

Modify Schedules

Clinic: PRIMARY CARE CLINIC

Provider: FROST,ROBERT

Dates selected: 07 Aug 2000 (MONDAY) to 07 Aug 2000 (MONDAY)

```
-----
Start  Appt  # per
Time  Type  Slot  Dur  Detail Codes          Slot Comment
-----
0700  PCM    1    30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXXX
0730  PCM    1    30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXXX
0800  PCM    1    30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXXX
0830  PCM    1    30  BPAD             SLOT COMMENT XXXXXXXXXXXXXXXXX
0900  PCM    1    30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXXX
0930  PCM    1    30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXXX
1000  PCM    1    30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXXX
1030  PCM    1    30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXXX
1130  PCM    1    30  PE BPAD          SLOT COMMENT XXXXXXXXXXXXXXXXX
-----
```

Select (M)odify, (A)dd, (D)elete, or (Q)uit: M//

===== End Screen 5: =====

4.4 PAS 097354 Appointment Booking

POC: Jane Barron

A. Functional Overview

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Managed Care Program (MCP) Health Care Finder (HCF) Booking module will be modified to allow an authorized CHCS user to the capability to:

- Search for available appointments by Standard Appointment Type and/or Detail Code(s).
- View up to 3 appointment detail codes linked to any schedule slot being displayed on the available appointment display list.
- Select an appointment detail code from clinic pick list and/or from complete appointment detail code pick list to link to an appointment being booked.
- Delete an appointment detail code linked to an appointment being booked.
- Permit the authorized user to change the appointment type for an appointment at the time of booking.
- Enter an Appointment Type/Detail Code Change Reason.
- Provide a Self-Referral Appointing option. This option will permit appointing to a non-Primary Care Manager without entry of a referral.
- Provide the capability to book a PCM appointment for an Active Duty patient, whose enrolling DMIS ID is defined as Ops Forces, with any PCM in any MCP Provider Group to which the patient's assigned PCM is a member.

B. Functional Dependencies

1. Appointment detail codes must be in the Appointment Detail Codes file (e.g., 'age restriction' appointment detail codes) before they can be linked to an appointment being booked
2. The clinic appointment detail code pick list should be populated before it can be access from the HCF Booking options. If no clinic appointment detail code pick list is created, the system will display the complete list of all current appointment detail codes to user when queried from the HCF Booking options.
3. When entering or editing appointment detail codes during the booking process, the authorized user may select appointment detail codes from the clinic pick list or the complete master list.

C. Business Rules

1. An authorized user may select up to three appointment detail codes to link to an individual patient appointment during the HCF booking process.
2. An authorized user will not be able to enter/edit appointment detail codes when booking an Unscheduled Visit or during End of Day processing.
3. An authorized user may delete any appointment detail code linked to an individual schedule slot at the time the schedule slot is booked.
4. The appointment type duration for a schedule slot may not be changed during the booking process. The authorized user may however modify the appointment duration by splitting and joining slots using the Browse, Single Patient Booking function.
5. The system provides the capability to restrict by appointment type which users are permitted to change the appointment type and/or detail codes via security keys. For each appointment type at the clinic and/or provider level, an authorized user may enter a site defineable security key in the Apointment Change Authority file in the Clinic and/ Provider Profile. This security key will then restrict which users may change the appointment type and/or any detail codes linked to the schedule slot at the time of booking. d
6. The system will now allow an authorized user to narrow the available appointment slots search by selecting and entering duration and appointment detail codes as secondary search criteria in all HCF Booking options. Clinic, provider and/ or specialty type and location are required primary search criteria in most HCF Booking options.

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7. During appointment searches, the user may search for available appointments using up to 3 appointment detail codes. The use of more appointment detail code categories used in the search will increase the probability of null searches
8. The system will allow the authorized user to search for available appointment slots by entering only detail codes as secondary search criteria. The system will search for and display only those available appointment slots that have exactly the same detail codes and/or contain a subset of the detail codes entered as search criteria.
9. The system will require the authorized user to select an appointment type when Duration is selected as secondary search criteria.
10. The system will continue to prompt the authorized user to enter an Access to Care (ATC) category prior to initiating an available appointment search.
11. If an authorized user elects to join two consecutive appointment schedule slots with appointment detail codes that are not an exact match, the system will not display any detail codes on the Single Patient Browse- Change screen. The authorized user must enter the applicable detail codes for the newly joined schedule slot.
12. The Browse option will continue to be available in all HCF Booking functions with the exception of the Log Non-MTF Appointment function.
13. An authorized user will be able to modify appointment type and details codes via the Modify Appt action from all Health Care Booking option in MCP.
14. **If the authorized user modifies the appointment type and/or detail tail codes during the booking process, the system will store those changes in the new Patient Appointment record for that appointment. The system will not update the appointment type/detail codes linked to the schedule slot in the Scheduleable Entity file. If the pending appointment is cancelled, the system will then change the slot status from pending to open and display the original appointment type and/or detail codes for that schedule slot.**
15. **Self-Referral Booking will be accessible as a new HCF menu option and also as a new action on the main HCF Booking screen in the HCF Booking**

D. Workflow

PCM Booking

[PAS 3.2.10.3.2.15-1.0, PAS 3.2.10.3.2.15-2.0, PAS 3.2.10.3.2.15-3.0, PAS 3.2.10.3.2.15-4.0, PAS 3.2.10.3.2.16-1.0, PAS 3.2.10.3.2.16-2.0, PAS 3.2.10.3.2.16-3.0, PAS 3.2.10.3.2.16-4.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>BHCF
2. As soon as the authorized user selects the Health Care Finder Booking option, the system firsts prompts the user to select a patient and then once the patient has been selected displays the Demographics Screen. The authorized user is given the option to edit the patient demographics.
3. When the authorized user elects to continue with the booking process, the system displays the Health Care Finder Booking Screen. Based on the selected patient's enrollment status, the system allows the authorized user to select PCM Booking (i.e., primary care booking for enrolled patients), Non-Enrolled Booking (i.e., primary care booking for non-enrolled patients, Referral Booking (i.e., specialty care booking for both enrolled and non-enrolled patients) and/or Log Non-MTF Appointment.
4. When the authorized user selects PCM Booking from the HCF Booking action bar, the system prompts the authorized user to enter an ATC category prior to searching for and displaying the initial available appointment display list. The system will allow the authorized user to select a slot to book or press 'RETURN' to display the PCM MTF Booking Search Criteria screen (refer to Screen 1)

===== Start Screen 1: =====

PCM MTF BOOKING SEARCH CRITERIA

Patient: BLITON,JERALD

FMP/SSN: 20/278-55-5025

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Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT
Detail Codes:
 Provider: PRIMARY CARE GROUP
 Location: 23708
 Clinic Spec:
 Date Range: 03 Jul 2000 to 04 Jul 2000

ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type:
 Duration:
 Spec Type:
Provider Spec:
 Time Range: 0001 to 2400
 Days of Week: M TU W TH F SA S

=====

Patient Home Phone: 619 546 6121 Patient Duty Phone: 619 535 7265

=====

Select (C)hange Search Criteria, Appt (S)earch, Appt (R)efusal, (B)rowse, (T)el-Consult, or (Q)uit: S// C

===== End Screen 1: =====

5. It should be noted that the Detail Codes field has been added as Booking Search Criteria in the header on all MCP Booking screens. When the authorized user elects to change the booking search criteria, the system will display in the middle window of the PCM MTF Booking Search Criteria screen a list of all the booking search criteria that the user may modify for the appointment search (refer to Screen 2)

===== Start Screen 2: =====

PCM MTF BOOKING SEARCH CRITERIA

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT
Detail Codes:
 Provider: PRIMARY CARE GROUP
 Location: 23708
 Clinic Spec:
 Date Range: 03 Jul 2000 to 04 Jul 2000

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type:
 Duration:
 Spec Type:
Provider Spec:
 Time Range: 0001 to 2400
 Days of Week: M TU W TH F SA S

=====

Access to Care Category
Place of Care
Provider
* Appointment Type

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- * Detail Codes
 - Duration
 - Dates
- + Time Range

=====

Use SELECT key to select SEARCH CRITERIA

===== End Screen 2: =====

6. If the authorized user selects Appointment Type, Detail Codes, and Duration from the search criteria list, the system will first prompt the user to enter the new appointment type, up to three appointment detail codes and duration (refer to Screen 3).

===== Start Screen 3: =====

PCM MTF BOOKING SEARCH CRITERIA

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT
Detail Codes:
 Provider: PRIMARY CARE GROUP
 Location: 23708
 Clinic Spec:
 Date Range: 03 Jul 2000 to 04 Jul 2000

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type:
 Duration:
 Spec Type:
Provider Spec:
 Time Range: 0001 to 2400
Days of Week: M TU W TH F SA S

=====

Access to Care Category
Place of Care
Provider

- * Appointment Type
- * Detail Codes
- * Duration
- + Dates=====

Select APPT TYPE: PCM
Select SLOT DURATION: 30 minutes
Select DETAIL CODE: PE
Select ANOTHER: BPAD
Select ANOTHER:

===== End Screen 3: =====

7. Once the authorized user has entered or carriage returned through the DETAIL CODE field, the system will redisplay the PCM MTF Booking Search Criteria screen and action bar with the new search criteria displayed in the header (refer to Screen 4).

===== Start Screen 4: =====

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PCM MTF BOOKING SEARCH CRITERIA

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT
Detail Codes: PE BPAD
Provider: PRIMARY CARE GROUP
Location: 23708
Clinic Spec:
Date Range: 03 Jul 2000 to 04 Jul 2000

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type: WELL
Duration: 30
Spec Type:
Provider Spec:
Time Range: 0001 to 2400
Days of Week: M TU W TH F SA S

=====

Patient Home Phone: 619 546 6121 Patient Duty Phone: 619 535 7265

=====

Select (C)hange Search Criteria, Appt (S)earch, Appt (R)efusal, (B)rowse, (T)el-Consult, or (Q)uit: S//

===== End Screen 4: =====

8. The authorized user may elect to search for available appointments slots by appointment type only and not limit the search by entering an appointment detail code and/or appointment duration. If so, then the system will search for and display all available appointment slots with the specified appointment type regardless of any appointment detail codes or appointment duration linked to the available appointment slots.
9. The authorized user may also narrow the appointment search by entering appointment type, slot duration and up to 3 appointment detail codes as secondary appointment search criteria. The system will then search for and display only those available appointment slots with the specified appointment type, slot duration and detail codes or those that have a subset of the detail codes entered as search criteria (refer to Screen 5).

===== Start Screen 5: =====

PCM MTF BOOKING SEARCH CRITERIA

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC
Detail Codes: PE BPAD
Provider: PRIMARY CARE GROUP
Location: 23708
Clinic Spec:
Date Range: 03 Jul 2000 to 04 Jul 2000

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type: WELL
Duration: 30
Spec Type:
Provider Spec:
Time Range: 0001 to 2400
Days of Week: M TU W TH F SA S

=====

07 Aug 00 MON 0900 PCM 1/0 30 PE BPAD
07 Aug 00 MON 0930 PCM 1/0 30 PE BPAD

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*** 07 Aug 00 MON 1030 PCM 1/0 30 PE BPAD BPNPR**
07 Aug 00 MON 1100 PCM 1/0 30 PE BRAD BPNPR

=====

Use SELECT key to select appointment(s) to be booked
Press F9 to view additional appointment data

=====

===== End Screen 5: =====

10. The authorized user may then select one or more slots to book, or position the cursor next to an available slot and press F9 to view additional appointment data (refer to Screen 6).
11. If the authorized user selects an appointment slot to book and presses the 'RETURN' key, the system displays the FILE APPOINTMENT screen and allows the user to book the appointment (refer to Screen 7).

===== Start Screen 6: =====

PCM MTF BOOKING SEARCH CRITERIA

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC
Detail Codes: PE BPAD
Provider: PRIMARY CARE GROUP
Location: 23708
Clinic Spec:
Date Range: 03 Jul 2000 to 04 Jul 2000

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type: WELL
Duration: 30
Spec Type:
Provider Spec:
Time Range: 0001 to 2400
Days of Week: M TU W TH F SA S

=====

[MON 1030 PCM 1/0 30
PE PHYSICAL EXAMINATION
BPAD ACTIVE DUTY ONLY
BPNPR NO PRIME

SLOT COMMENT XX]

Facility: NBMC NAVSTA SEWELLS
Division: NAVY OUTPATIENT DIVISION
Building Name:
Building Number:
Street Address:
ZIP: 23708
City: PORTSMOUTH
State: VIRGINIA
Name: PRIMARY CARE CLINIC – NO
Clinic Location:
Clinic Availability:

ATC Reporting: YES
ATC Category: ACUTE
ATC Standard: 24 HRS

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Telephone: 234-5678
Provider: PRIMARY CARE GROUP

=====

Use NEXT SCREEN/PREV SCREEN keys to view text or Press RETURN to continue

=====

----- End Screen 6: -----

12. If the authorized user presses the 'EXPAND' key (F9), the appointment data for the selected appointment slot will be displayed in its entirety in the middle window of the BOOKING Search Criteria. The authorized may view the data by pressing 'NEXT' and 'PREV' keys.

===== Start Screen 7: =====

FILE APPOINTMENT

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT
Detail Codes: PE BPAD
Provider: PRIMARY CARE GROUP
Location: 23708
Clinic Spec:
Date Range: 03 Jul 2000 to 04 Jul 2000

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type: WELL
Duration: 30
Spec Type:
Provider Spec:
Time Range: 0001 to 2400
Days of Week: M TU W TH F SA S

=====

07 Aug 00 0700 MON 1030 PCM 1/0 30 PE BPAD BPNPR

=====

----- Select Slot #1 of 1 -----

Select (B)ook appt, (M)odify Appt or (Q)uit FILE APPOINTMENT: B//

----- End Screen 7: -----

13. If the authorized user selects the (B)ook appt action from the FILE APPOINTMENT action bar, the system displays the FILE APPOINTMENT screen and allows the authorized user to file the appointment (refer to Screen 8)
14. If the authorized user selects the (M)odify Appt action, the system redisplay the FILE APPOINTMENT screen and prompts the authorized user to change the appointment type, enter/edit the detail codes linked to the appointment, and enter an appointment change reason (refer to Screen 9).

===== Start Screen 8: =====

PATIENT APPOINTMENT: BLITON,JERALD

FILE APPOINTMENT

MON 1030 07 AUG 00 PCM 1/0 **30 PE BPAD**

SLOT COMMENTXXXXXXXXXXXX

No reminder notice will be sent. Hand-carry Radiology/Patient records.

O/S Rec Loc:

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Clinic Message: NEW PTS ARRIVE 25 MINUTES EARLY
Clinic/Appt Type Instructions: CALL 540-2313 TO CANCEL APPT
Provider Message:
Provider/Appt Type Instructions:
Arrival Message: 15 minutes
Registration Comment:

MEPRS Code: BAAA
Requesting Service:
Referred By:
Send Reminder Notice: NO
Appointment Comment:
Reason for Appointment:

Ask for Help = HELP Screen Exit = F10 File/Exit = DO

===== End Screen 8: =====

15. Once the authorized user has entered and filed the appointment data, the system will create an entry in the Patient Appointment file to include the detail codes linked to the appointment, if any, and reason for changing the appointment type and/or detail codes, if any. The system then redisplay the PCM MTF BOOKING SEARCH CRITERIA screen and action bar (refer to Screen 4). The system allows the authorized user to elect to (C)hange Search Criteria, Appt (S)earch, Appt (R)efusal, (B)rowse, (T)el-Consult, or (Q)uit PCM Booking.

===== Start Screen 9: =====

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC - NO/N-OUT
Detail Codes: PE BPAD
Provider: PRIMARY CARE GROUP
Location: 23708
Clinic Spec:
Date Range: 03 Jul 2000 to 04 Jul 2000

FILE APPOINTMENT

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type: WELL
Duration: 30
Spec Type:
Provider Spec:
Time Range: 0001 to 2400
Days of Week: M TU W TH F SA S

=====

07 Aug 00 0700 MON 1030 PCM 1/0 30 PE BPAD BPNPR

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=====

Select APPT TYPE: ROUT

Select DETAIL CODE: PE

Select ANOTHER: BPAD

Select ANOTHER:

APPOINTMENT CHANGE REASON: [FREE TEXT]

===== End Screen 9: =====

16. Once the authorized user has accepted or modified the current appointment type for the slot selected, the system will prompt the authorized user to enter/edit appointment detail codes linked to the selected appointment slot.
17. If the authorized user modifies either the appointment type and/or detail codes, the system will prompt the authorized user to enter an Appointment Change Reason . It is a free-text field.
18. Once the authorized user files the appointment modifications, the system updates the appointment slot data accordingly and redisplay the PCM MTF BOOKING SEARCH CRITERIA screen and action bar (refer to Screen 4). The system allows the authorized user to elect to (C)hange Search Criteria, Appt (S)earch, Appt (R)efusal, (B)rowse, (T)el-Consult, or (Q)uit PCM Booking.

Referral Enter/Edit

[PAS 3.2.10.3.2.17-1.0, PAS 3.2.10.3.2.17-2.0, PAS 3.2.10.3.2.17-3.0, PAS 3.2.10.3.2.17-4.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>BHCF
2. As soon as an authorized user elects to enter a referral for specialty care, the system displays the REFERRAL ENTER/EDIT screen and allows the authorized user to enter the referral information (refer to Screen 1).

===== Start Screen 1: =====

MCP Referral: 20000000110

Referral Date/Time: 10 Feb 2000@1333

REFERRAL ENTER/EDIT

Patient: BLITON,JERALD

FMP/SSN: 20/278-55-5025

Pat SSN: 278-55-5025

Sex/DOB/Age: M/01 Jan 1960/40Y

Pat Cat: USA ACTIVE DUTY OFFICER

Patient Type: MCP/ACTIVE DUTY

Home Zip: 23668

Duty Phone: 619 535 7265

Home Phone: 619 546 6121

Phone: 619 535 7265

Case Mgmt Prov:

PCM Phone: 234-5678

PCM: PRIMARY CARE GROUP

Referred by: POTTER,HARRY

Referral from: PRIMARY CARE CLINIC

Priority: ROUTINE

of Visits Requested: 1

ATC Category: WELLNESS

Appt Type: WELL

Clinic Specialty: PRIMARY CARE

Duration: 30

Prov Specialty:

Start Date: 10 Aug00

Place of Care: PRIMARY CARE CLINIC

Stop Date: 09 Sep 00

Provider: BRICE,ROBERT

Start Time: 0001

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Spec Type:
Location:
Language:

Stop Time: 2400
Days of Week:
Prefer Gender:

===== End Screen 1: =====

3. As part of Appointment Standardization Phase II, the system will allow the authorized user to modify the duration for the appointment type selected (refer to Screen 1) and/or link up to 3 appointment detail codes to a specialty care referral request (refer to Screen 2).

===== Start Screen 2: =====

MCP Referral: 20000000110

Referral Date/Time: 07 Aug 2000@1333

REFERRAL ENTER/EDIT

Patient: BLITON,JERALD

FMP/SSN: 20/278-55-5025

Pat SSN: 278-55-5025

Sex/DOB/Age: M/01 Jan 1960/40Y

Pat Cat: USA ACTIVE DUTY OFFICER

Patient Type: MCP/ACTIVE DUTY

Home Zip: 23668

Duty Phone: 619 535 7265

Home Phone: 619 546 6121

Phone: 619 535 7265

Case Mgmt Prov:

PCM Phone: 234-5678

PCM: PRIMARY CARE GROUP

=====

Appointment Detail Code:

PE

BPAD

Reason for Referral:

Provisional Diagnosis (ICD9):

Provisional Diagnosis (Free Text):

Referral Procedure:

===== End Screen 2: =====

4. If the authorized user enters any appointment detail codes in the referral request, the system will use the detail codes along with the appointment type and duration if entered, when searching for available appointment slots.

===== Start Screen 3: =====

MCP Referral: 20000000110

Referral Date/Time: 07 Aug 2000@1333

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REFERRAL ENTER/EDIT

Patient: BLITON,JERALD
Pat SSN: 278-55-5025
Pat Cat: USA ACTIVE DUTY OFFICER
Home Zip: 23668
Home Phone: 619 546 6121
Case Mgmt Prov:
PCM: PRIMARY CARE GROUP

FMP/SSN: 20/278-55-5025
Sex/DOB/Age: M/01 Jan 1960/40Y
Patient Type: MCP/ACTIVE DUTY
Duty Phone: 619 535 7265
Phone: 619 535 7265
PCM Phone: 234-5678

Current Review Status/Comment:
Status:

New Review Status:
New Review Comment:

File/exit Abort Edit
File changes and exit.

End Screen 3:

5. Once the authorized user has filed the referral, the authorized user may elect to do a provider search or edit the referral.
6. It should be noted that if there are no available appointment slots for the appointment type and or detail codes linked to the Referral entered, the HCF using the Referral Booking option may select an available appointment slot and modify the appointment type and/or detail codes prior to booking the appointment.

Referral Booking

[PAS 3.2.10.3.2.18-1.0, PAS 3.2.10.3.2.18-2.0, PAS 3.2.10.3.2.18-3.0, PAS 3.2.10.3.2.18-4.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>BHCF
2. As soon as an authorized user elects to book a MCP referral, the system displays the Referral Summary screen and allows the user to select the referral to book. Based on the Referral data entered, the system will search for and display all available appointment slots that meet the referral request criteria including location, specialty, provider, place of care, appointment type, detail code/s etc. (refer to Screen 1).

Start Screen 1:

SINGLE PATIENT BOOKING

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: CARDIOLOGY CARE
Detail Codes: PE BPAD
Provider:
Location:
Date Range: 25 Jul 2000 to 24 Aug 2000

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
PLOC Phone: 234-5678
Appt Type: WELL
Spec Type:
Clinic Spec:
Provider Spec:

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Time Range: 0001 to 2400						Days of Week: M TU W TH F SA S					
TUE 0900 25 Jul 00 WELL	1/0	30	PE	BPAD		RICHARD,P					
TUE 0930 25 Jul 00 WELL	1/0	30	PE	BPAD		RICHARD,P					
TUE 1000 25 Jul 00 WELL	1/0	30	PE	BPAD		RICHARD,P					
TUE 1030 25 Jul 00 WELL	1/0	30	PE	BPAD		RICHARD,P					
TUE 1100 25 Jul 00 WELL	1/0	30	PE	BPAD		RICHARD,P					
TUE 1130 25 Jul 00 WELL	1/0	30	PE	BPAD		RICHARD,P					
+ TUE 1200 25 Jul 00 WELL	1/0	30	PE	BPAD		RICHARD,P					

Use SELECT key to select appointment to be booked
Press F9 to view additional appointment data

===== End Screen 1: =====

3. If the authorized user entered an appointment type but not any appointment detail codes and/or appointment duration, the system will search for and display all available appointment slots with the specified appointment type regardless of any appointment detail codes or appointment duration linked to the available appointment slots.
4. If the authorized user entered appointment type, slot duration, and up to 3 appointment detail codes in the referral, the system will then search for and display only those available appointment slots with the specified appointment type, slot duration and an exact match of the detail codes entered in the referral.
5. Once the authorized user selects an available appointment slot from the appointment pick list and elected to book the appointment, the system will display the FILE APPOINTMENT screen (refer to PCM BOOKING, Screens 8 and 9) and allow the authorized user to book the appointment.

Non-Enrolled Booking

[PAS 3.2.10.3.2.19-1.0, PAS 3.2.10.3.2.19-2.0, PAS 3.2.10.3.2.19-3.0, PAS 3.2.10.3.2.19-4.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>BHCF
2. If an authorized user elects to book a primary care appointment for a non-enrolled MCP patient by selecting the Non-Enrolled Booking action from the HCF Booking action bar, the system will display the NON-ENROLLEE BOOKING SEARCH CRITERIA screen and prompt the user to select the appropriate search criteria (refer to Screen 1).

===== Start Screen 1: =====

NON-ENROLLEE BOOKING SEARCH CRITERIA

Patient: BLITON,CINDERAL	FMP/SSN: 04/278-55-5025
Patient Type: CHAMPUS	ATC Category:
Place of Care:	PLOC Phone:
Detail Codes:	Appt Type:
Provider:	Spec Type:
Location:	Clinic Spec:
Date Range: 05 Jul 2000 to 16 Aug 2000	Provider Spec:
Time Range: 0001 to 2400	Days of Week: M TU W TH F SA SU

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* Access to Care Category

Location

Specialty

Place of Care

Provider

Appointment Type

Detail Codes

+ Duration

=====

Use SELECT key to select SEARCH CRITERIA

===== End Screen 1: =====

3. As part of Appointment Standardization Phase II, Details Codes have added as booking search criteria. If the authorized user selects Detail Codes from the list of search criteria, the system will prompt the authorized user to enter up to 3 detail codes.
4. Once the authorized user has entered up to 3 detail codes for the appointment search, the system will display those detail codes as search criteria in the header of NON-ENROLLEE Booking Search Criteria screen.
5. As in PCM Booking and Referral Booking, the system will search for available appointments based on the search criteria entered. The authorized user may elect to search for available appointment slots by appointment type only and not limit the search by entering an appointment detail code and/or appointment duration. If so, then the system will search for and display all available appointment slots with the specified appointment type regardless of any appointment detail codes or appointment duration linked to the available appointment slots.
6. The authorized user may also narrow the appointment search by entering appointment type, slot duration and up to 3 appointment detail codes as secondary appointment search criteria. The system will then search for and display only those available appointment slots with the specified appointment type, slot duration and an exact match of the detail codes entered as search criteria by the authorized user (refer to Screen 5).
7. The system will also allow the authorized user to search for available appointments by entering only detail codes as secondary search criteria. The system will then search for and display only those available appointment slots with the specified detail codes linked to them, regardless of appointment type or duration. Once the authorized user selects an available appointment from the pick list and elected to book the appointment, the system will display the FILE APPOINTMENT screen (refer to PCM BOOKING, Screens 8 and 9) and allow the authorized user to book the appointment. It should be noted that the authorized user may modify the appointment data (i.e., appointment type, detail codes and appointment change reason) prior to booking the appointment.

Log Non-MTF Appointment

[PAS 3.2.10.3.2.20-1.0, PAS 3.2.10.3.2.20-2.0, PAS 3.2.10.3.2.20-3.0, PAS 3.2.10.3.2.20-4.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>BHCF
2. When the authorized user elects to (L)og Non-MTF Appointment, the system will display the NON-MTF APPOINTMENT LOG ENTER/EDIT screen (refer to Screen 1)

===== Start Screen 1: =====

NON-MTF APPOINTMENT LOG ENTER/EDIT

Patient: BLITON,JERALD
Pat SSN: 278-55-5025

FMP/SSN: 20/278-55-5025
Sex/DOB/Age: M/01 Jan 1960/40

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PatCat: USA ACTIVE DUTY OFFICER
Home Zip: 23668
Home Phone: 619 546 6121
PCM: PRIMARY CARE GROUP
PLOC: PRIMARY CARE CLINIC - NO

Patient Type: MCP/ACTIVE DUTY
Duty Phone: 619 535 7265
Work Phone: 619 535 7265
PCM Phone: 234-5678
Case Mgmt Prov:

=====

Appt Type: N-MTF
Appt Date/Time: 09 Aug00@1400
Place of Care: TARPIN ASSOCIATES
Provider: TARPIN,DANIELE
MEPRS: BACA
Appointment Comment:
Detail Codes:

PLOC Phone: (800) 234-1204
Provider Spec: CARDIOLOGY

MCP Referral #: 20000010089
Date/Time Logged: 09 Aug00 @1019
Cancel Date/Time:

Ref Date/Time: 09 Aug0@1018
Logged by: CRAWFORD,JACQUI
Canceled by:

===== End Screen 1: =====

3. As soon as the authorized user has enter the Non-MTF appointment data (including, date/time, place of care, provider) and required referral information, the system will allow the authorized user to link appointment detail codes to Non-MTF appointment.
4. As with all MCP Booking options, the system will allow the authorized user to enter/edit up to 3 appointment detail codes to link to a Non-MTF appointment being logged.

Self-Referral Booking

[PAS 3.2.10.3.2.22-1.0, PAS 3.2.10.3.2.22-2.0, PAS 3.2.10.3.2.22-3.0, PAS 3.2.10.3.2.22-4.0, PAS 3.2.10.3.2.22-5.0, PAS 3.2.10.3.2.22-6.0, PAS 3.2.10.3.2.22-7.0, PAS 3.2.10.3.2.22-8.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>SHCF
2. A new option, SHCF Self-Referral Booking, has been added to the Health Care Finder Menu in MCP (refer to Screen 1).

===== Start Screen 1: =====

AHCF Appointment Order Processing
BHCF Health Care Finder Booking
SHCF Self-Referral Booking
EHCF Enter Appointment Refusals
CHCF Cancellation by Patient

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OHCF Output Products
RHCF Health Care Finder Reports Menu
LHCF Print Patient Address Label
EENR Enrollment Enter/Edit

Select Health Care Finder Menu Option:

===== End Screen 1: =====

3. The Self-Referral Booking option allows an authorized user to book a patient requested appointment with a specialty care provider in a clinic that allows self-referrals without entering a MCP Referral. The specified clinic must have the Self-Referrals Allowed field in the Clinic Profile set to YES (refer to Component UDF PAS 097351 Profiles/File & Table Build) in order to book an appointment using the Self-Referral Booking option.
4. As soon as the authorized user selects the Self-Referral Booking option, either from the Health Care Finder menu (refer to Screen 1) or from the main action bar in Health Care Finder Booking, the system displays the SELF-REFERRAL BOOKING SEARCH CRITERIA screen and action bar (refer to Screen 2).

===== Start Screen 2: =====

SELF-REFERRAL BOOKING SEARCH CRITERIA

Patient:	FMP/SSN:
Place of Care:	PLOC Phone:
Provider:	ATC Category:
Detail Codes:	Appt Type:
Time Range: 1454 to 1454	Duration:
Dates:	Days of Week:

===== Access to Care Category, Patient and PLOC are required =====

(C)hange the Self-Referral search criteria, or (Q)uit: C//

===== End Screen 2: =====

5. When booking an appointment to a non- Primary Care Manager in a specialty care clinic that allows self-referrals, the authorized user must enter Access to Care Category, Patient and Place of Care as primary search criteria. As soon as the authorized user accepts the default to enter search criteria, the system will display a list of the primary and secondary search criteria in the middle window of the SELF-REFERRAL BOOKING SEARCH CRITERIA screen (refer to Screen 3).

===== Start Screen 3: =====

SELF-REFERRAL SEARCH CRITERIA

Patient:	FMP/SSN:
Place of Care:	PLOC Phone:

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Provider:
Detail Codes:
Time Range: 1454 to 1454
Dates:

ATC Category:
Appt Type:
Duration:
Days of Week:

=====

- * Access to Care Category
- * Patient
- Provider
- * Place of Care
- * Appointment Type
- * Detail Codes
- * Duration
- + Dates

===== Access to Care Category, Patient and PLOC are required =====

Select Appt Type: WELL
Select DURATION: 30
Select DETAIL CODE: HEAD
Select ANOTHER:

===== End Screen 3: =====

6. The system will first prompt the authorized user to enter ATC Category, PLOC, and Patient. Once the authorized user has entered the primary search criteria, the system will then prompt the authorized user to enter the secondary search criteria if any were selected.
7. Once the authorized user has entered the appropriate search criteria and pressed 'RETURN' to continue, the system will redisplay the SELF-REFERRAL BOOKING SEARCH CRITERIA screen and action bar with the new search criteria displayed in the header (refer to Screen 4).

===== Start Screen 4: =====

SELF-REFERRAL BOOKING SEARCH CRITERIA

Patient: BROWN,JOYCE
Place of Care: GENERAL MEDICINE
Provider:
Detail Codes: HEAD
Time Range:
Dates: 07 Aug 00 to 06 Sept 00

FMP/SSN: 30/430-36-2947
PLOC Phone: 230-4666
ATC Category: WELLNESS
Appt Type: WELL
Duration: 30
Days of Week:

=====

(C)hange the Self-Referral Criteria, Appt (S)earch, or (Q)uit: S//

===== End Screen 4: =====

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8. If the authorized user selects the Appt (S)earch action from the action bar, the system will search for and display all available appointments in the specified place of care that meet the search criteria entered (refer to Screen 5).

```
===== Start Screen 5: =====
                                SELF-REFERRAL BOOKING
Patient: BROWN,JOYCE              FMP/SSN: 30/430-36-2947
Place of Care: GENERAL MEDICINE   PLOC Phone: 230-4666
Provider:                        ATC Category: WELLNESS
Detail Codes: HEAD               Appt Type: WELL
Time Range:                      Duration: 30
Dates: 07 Aug 00 to 06 Sept 00    Days of Week:

=====
* MON 0900 07 Aug 00 WELL 10/0 60 HEAD      CRAWFORD,JOAN
  MON 1400 07 Aug 00 WELL 10/5 60 HEAD      ALEXANDER,NEIL
  WED 0800 09 Aug 00 WELL 10/5 60 HEAD      CAMPBELL,ANN
=====

Use SELECT key to select appointment(s) to be booked
Press F9 to view additional appointment data
```

===== End Screen 5: =====

9. As in PCM Booking and Referral Booking, the system will search for available appointments based on the search criteria entered. The authorized user may elect to search for available appointment slots by appointment type only and not limit the search by entering appointment detail code and/or appointment duration. If so, then the system will search for and display all available appointment slots with the specified appointment type regardless of any appointment detail codes or appointment duration linked to the available appointment slots.
10. The authorized user may also narrow the appointment search by entering appointment type, slot duration and up to 3 appointment detail codes as secondary appointment search criteria. The system will then search for and display only those available appointment slots with the specified appointment type, slot duration and an exact match of the detail codes entered or a subset of the detail codes entered as search criteria (refer to Screen 3).
11. The system will also allow the authorized user to search for available appointments by enter only detail codes as secondary search criteria. The system will then search for and display only those available appointment slots with the specified detail codes linked to them, regardless of appointment type or duration
12. Once the authorized user has selected an appointment slot, the system will redisplay the SELF-REFERRAL BOOKING screen and allow the authorized user to book the appointment selected (refer to Screen 6).

```
===== Start Screen 6: =====
                                SELF-REFERRAL BOOKING
Patient: BROWN,JOYCE              FMP/SSN: 30/430-36-2947
Place of Care: GENERAL MEDICINE   PLOC Phone: 230-4666
Provider:                        ATC Category: WELLNESS
Detail Codes: HEAD               Appt Type: WELL
Time Range:                      Duration: 30
Dates: 07 Aug 00 to 06 Sept 00    Days of Week:

=====
```


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* MON 0900 07 Aug 00 WELL 10/0 60 HEAD

CRAWFORD,JOAN

===== Select Slot #1 of 1 =====
Select (B)ook Appt, (M)odify Appt or (Q)uit FILE APPOINTMENT: B//

===== End Screen 6: =====

13. If the authorized user selects the (M)odify Appt action, the system will allow the authorized user to change the appointment type and/or the detail codes linked to the selected appointment slot. If the authorized user makes any changes to the appointment type and/or the detail codes, the system will require the authorized user to enter a reason for the change (refer to PCM Booking, Screen 9).
14. If the authorized user selects the (B)ook Appt action, the system will display the FILE APPOINTMENT screen (refer to PCM BOOKING, Screens 8) and allow the authorized user to book the appointment.
15. It should be noted that for self-referral reporting purposes, once the appointment has been successfully booked, the system would automatically create a system-generated (self) referral in the MCP Referral file. The Clinic Specialty entered in the Clinic Profile for the specified clinic will be linked to the new system-generated Self-Referral. If the specified clinic has multiple clinic specialties entered in the Clinic Specialty field in the Clinic Profile, the system will prompt the authorized user to select the appropriate Clinic Specialty to link to the Self-Referral (refer to Screen 7).

===== Start Screen 7: =====

SELF-REFERRAL BOOKING

Patient: BROWN,JOYCE
Place of Care: GENERAL MEDICINE
Provider:
Detail Codes: HEAD
Time Range:
Dates: 07 Aug 00 to 06 Sept 00

FMP/SSN: 30/430-36-2947
PLOC Phone: 230-4666
ATC Category: WELLNESS
Appt Type: WELL
Duration: 30
Days of Week:

=====

Clinic Specialty:

CRITICAL CARE
GENERAL MEDICINE
* OCCUPATIONAL HEALTH

=====

Use SELECT key to select the Clinic Specialty to link to the Self-Referral

===== End Screen 7: =====

16. Once the authorized user has selected the appropriate Clinic Specialty and pressed 'RETURN' to continue, the system will display the FILE APPOINTMENT screen (refer to PCM BOOKING, Screens 8) and allow the authorized user to book the appointment.

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Wait List Request

[PAS 3.2.10.3.2.27-1.0, PAS 3.2.10.3.2.27-2.0, PAS 3.2.10.3.2.27-3.0]

1. MENU PATH: C=>PAS=>M=>CDSK=>WLR
2. When an authorized user elects to add or edit a Wait List Request for a specified clinic or a specified clinic and provider, the system will display the Wait List Add screen and allow the authorized user to enter/edit the appropriate Wait List Request data (refer to Screen 1).

```
===== Start Screen 1: =====
PATIENT APPOINTMENT: BLITON,JERALD                                SD WAIT LIST ADD
PATIENT: BLITON,JERALD                                           FMP/SSN: 20/278-55-5025
HOME PHONE: 619 546 6121                                         WORK PHONE: 619 535 7265
STREET: 4235 CANDY CANE LANE                                     ZIP CODE: 23668
CITY: HAMPTON                                                    STATE: VIRGINIA
=====
CLINIC: PRIMARY CARE CLINIC                                     APPT TYPE: WELL
PROVIDER: POTTER,HARRY                                           DURATION: 30
DETAIL CODES
PE
BPAD
=====
WAIT LIST PRIORITY: 2
REQUESTED START TIME: 0001                                     REQUESTED STOP TIME: 2400
DAYS OF WEEK: M TU W TH F
WAIT LIST TARGET DATE: 05 Jul 2000
WAIT LIST COMMENT:
REASON FOR APPOINTMENT:
===== End Screen 1: =====
```

3. As part of Appointment Standardization, Phase II, the authorized user will be able to enter slot duration and appointment detail codes when entering a Wait List Request.
4. When the newly entered/edited Wait List Request is processed, the system will use the appointment detail codes to search for available appointments (refer to Wait List Processing section of this UDF).

Wait List Processing

[PAS 3.2.10.3.2.28-1.0, PAS 3.2.10.3.2.28-2.0, PAS 3.2.10.3.2.28-3.0]

1. MENU PATH: C=>PAS=>M=>CDSK=>NOT=>WNOT
2. When an authorized user elects to book a Wait List Request, the system displays the WAIT LIST PROCESSING SEARCH CRITERIA screen and action bar.
3. Once the authorized user has selected and entered the appropriate wait list request to processing search criteria (e.g., Clinic is required), the system will prompt the authorized user for the Wait List Sort Criteria (i.e., priority, date entered, target date, or patient).
4. As soon as the sort criteria have been selected, the system will search for all Wait List Requests based on search criteria entered.

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5. The system displays all Wait List Requests for the criteria entered in the middle window of the Wait List Requests by [sort criteria selected] screen and action bar.
6. The system allows the authorized user to select either (A)ll or (I)ndividual Patients to process. The system also allows the authorized user to select the (P)rint Hardcopy action to select and print a hardcopy of the Wait List Requests displayed in the middle window of the WAIT LIST PROCESSING SEARCH CRITERIA screen .
7. Once the authorized user has selected the Wait List Request/s to process, the system displays the NOTIFICATION PROCESSING screen for the first Wait List Request to process (refer to Screen 1)

===== Start Screen 1: =====

NOTIFICATION PROCESSING

DIVISION: PORTSMOUTH
PATIENT: BLITON, JERALD
SPONSOR: BLITON, JERALD

FMP/SSN: 20/278-55-5025 AGE: 40
DUTY PHONE: 619 535 7265

HOME PHONE: 619 546 6121
WAIT LIST REQUEST: 07Aug WELL 30 BPAD PE
TIME RANGE: 0001 TO 2400
WAIT LIST COMMENT:
REASON FOR APPOINTMENT:

WORK PHONE: 619 535 7265
POTTER, HARRY
DAYS of WEEK: M TU W TH F

PRIORITY: 2
CONTACT ATTEMPTS DATE@TIME

ZIP CODE: 23668
(Yes/No)

=====

Select (T)elephone/No Mailer, (M)ailer, (D)elete, or (Q)uit Processing:

===== End Screen 1: =====

8. The NOTIFICATION PROCESSING screen will be modified to include the duration and detail codes for the appointment being requested in the WAIT LIST REQUEST field (refer to Screen 1, WAIT LIST REQUEST field).
9. The system allows the authorized user the capability to contact the patient by telephone in order to book the Wait List Request or to book the Wait List Request and generate a mailer notifying the patient of the Pending Appointment. Please note that the Wait List Mailer will not include any detail codes linked to the Pending Appointment.
10. Once the authorized user has selected to telephone the patient or generate a mailer, the system displays the WAIT LIST BOOKING SEARCH CRITERIA screen and action bar (refer to Screen 2).

===== Start Screen 2: =====

WAIT LIST BOOKING SEARCH CRITERIA

Patient: BLITON, JERALD

FMP/SSN: 20/278-55-5025

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Clinic: PRIMARY CARE CLINIC

Clinic Phone: 234-0987

Provider: POTTER,HARRY

Detail Codes: PE BPAD

Time Range: Dates: 07 Aug 00 to 06 Sept 00

ATC Category: WELLNESS

Appt Type: WELL

Duration: 30

Srv Type:

Days of Week: M TU W TH F

=====

Wait List Comment :

Wait List Priority : 2

Wait List Target Date : 05 Jul 00

Wait List Entry Date : 05 Jul 2000@1118

Reason for appointment:

=====

Select (C)hange Search Criteria, (S)ingle Patient, (B)rowse, (T)el-Consult, or (Q)uit: S// C

=====

===== End Screen 2: =====

11. If the authorized user selects the (C)hange Search Criteria action, the system displays the Wait List Booking search criteria in the middle window of the WAIT LIST BOOKING SEARCH CRITERIA screen and allow the authorized user to select the Wait List Booking search criteria to be modified (refer to Screen 3).
12. If the authorized user select the (S)ingle Patient action from the WAIT LIST BOOKING SEARCH CRITERIA action bar, the system will then search for and display all available appointment that meet the Wait List Booking search criteria on the SINGLE PATIENT BOOKING screen (refer to Referral Booking, Screens 1).
13. If the authorized user selects the (B)rowse action from the WAIT LIST BOOKING SEARCH CRITERIA action bar, the system will allow the authorized you to browse a specified provider's appointment schedule for a date specified (refer to BROWSE section in the APPOINTMENT BOOKING UDF).
14. If the authorized user selects the (T)el-Consults action from the WAIT LIST BOOKING SEARCH CRITERIA action bar, the system will allow the authorized you to enter a telephone consult for the specified patient without leaving the Wait List Processing option. It should be noted that Telephone Consults will not be modified to include appointment detail codes as part of Appointment Standardization, Phase II.

===== Start Screen 3: =====

WAIT LIST BOOKING SEARCH CRITERIA

Patient: BLITON,JERALD

Clinic: PRIMARY CARE CLINIC

Clinic Phone: 234-0987

Provider: POTTER,HARRY

Detail Codes: PE BPAD

Time Range: Dates: 07 Aug 00 to 06 Sept 00

FMP/SSN: 20/278-55-5025

ATC Category: WELLNESS

Appt Type: WELL

Duration: 30

Srv Type:

Days of Week: M TU W TH F

=====

Access to Care Category

Provider

Clinic

Appointment Type

DRAFT

Duration
Detail Codes
Dates
Time Range
Days of Week
Service Type

===== Access to Care Category, Appt Type, Patient and Clinic are required =====
Use SELECT key to select SEARCH CRITERIA to be changed

===== End Screen 3: =====

15. The system will now allow the authorized user to select DURATION and DETAIL CODES as secondary Wait List Booking search criteria.
16. Once the authorized user has selected the search criteria to be modified, the system will prompt the authorized user to enter the new search criteria.
17. As soon as the new criteria has been entered, the system will redisplay the WAIT LIST BOOKING SEARCH CRITERIA screen and action bar (refer to Screen 2).

Automatic Waitlist Processing

Currently, CHCS provides the capability to automatically book appointments from the Wait List by setting the AUTOMATIC WAIT LIST PROCESSING field in the Clinic Profile to YES. During schedule creation if the AUTOMATIC WAIT LIST PROCESSING field is set to YES, the (W)AIT List Schedules action is displayed and if selected, the newly created schedule is put into a WAIT status and a background job is triggered by TASK MANAGER that automatically books the appointments based on provider, clinic, appointment type, and target date entered in the Wait List Request.

As part of Appointment Standardization Phase II, an authorized user may enter up to 3 appointment detail codes when entering a Wait List Request. The current Automatic Wait List Processing functionality will be modified to adhere to the following business rules:

1. The appointment type and duration in the Wait List Request being processed must match the appointment type and duration of the schedule slot.
2. If there are any appointment detail codes linked to the WAITED schedule slot, then the appointment detail codes linked to the Wait List Request being processed must match exactly with those linked to the WAITED schedule slot.
3. If there are no appointment detail codes linked to a schedule slot, then the appointment detail codes linked to the Wait List Request must match or be a subset of those appointment detail codes linked to the specified clinic.

Browse

1. MENU PATH: C=>PAS=>M=>HMCP=>BHCF
2. The Browse action can be accessed from any HCF Booking Search Criteria screen. It allows the authorized user to search for and display a specified provider's schedule for a specified date (refer to Screen 1).

===== Start Screen 1: =====

Patient: BLITON,JERALD PCM MTF BOOKING SEARCH CRITERIA
FMP/SSN: 20/278-55-5025

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Patient Type: MCP/ACTIVE DUTY
Place of Care: PRIMARY CARE CLINIC
Detail Codes: PE BPAD
Provider: POTTER,HARRY
Location: 23708
Clinic Spec:
Date Range: 03 Jul 2000 to 04 Jul 2000

ATC Category:
PLOC Phone: 234-5678
Appt Type: WELL
Duration: 30
Spec Type:
Provider Spec:
Time Range: 0001 to 2400
Days of Week: M TU W TH F SA S

Patient Home Phone: 619 546 6121 Patient Duty Phone: 619 535 7265

Select (C)hange Search Criteria, Appt (S)earch, Appt (R)efusal, (B)rowse, (T)el-Consult, or (Q)uit: S// B
===== End Screen 1: =====

3. When the authorized user elects to browse a specified provider's schedule and selects the (B)rowse option, the system displays the [HCF Booking option] SINGLE PATIENT BROWSE SEARCH CRITERIA screen (refer to Screen 2).

===== Start Screen 2: =====

PCM MTF SINGLE PATIENT BROWSE SEARCH CRITERIA
Patient: BLITON,JERALD FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC
POC Phone: 234-5678
Provider: POTTER,HARRY Date: 04 Aug 2000

Select (C)hange Search Criteria, (S)earch Schedule, or (Q)uit BROWSE: C// S
===== End Screen 2: =====

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4. The system displays the current search criteria in the header of the [HCF Booking option] SINGLE PATIENT BROWSE SEARCH CRITERIA screen and action bar. The system allows the authorized user to change the current search criteria for provider and date only by selecting the (C)hange Search Criteria, search for the current provider's schedule for the current date specified by selecting the (S)earch Schedule, or quit Browse by selecting (Q)uit BROWSE.
5. If the authorized user selects the (C)hange Search Criteria action, the system redisplay the [HCF Booking option] SINGLE PATIENT BROWSE SEARCH CRITERIA screen with the search criteria Provider and Date displayed in the middle window. The system allows the authorized user to select the criteria to change and then prompts the authorized user to enter the new criteria.
6. As soon as the authorized user has entered the new criteria and pressed 'RETURN' to continue the system redisplay of the [HCF Booking option] SINGLE PATIENT BROWSE SEARCH CRITERIA screen with the new search criteria displayed in the header.
7. If the authorized user selects the (S)earch Schedule action, the system searches for and displays on the [HCF Booking option]SINGLE PATIENT BROWSE screen with the selected provider's schedule for the date specified displayed in the middle window (refer to Screen 3).

```
===== Start Screen 3: =====
                        PCM MTF SINGLE PATIENT BROWSE
Patient: BLITON,JERALD                      FMP/SSN: 20/278-55-5025
Place of Care: PRIMARY CARE CLINIC
POC Phone: 234-5678
Provider: POTTER,HARRY                      Date: 04 Aug 2000

*****
FRI 0700 04 Aug 00 WELL 1/1 30 PE BPAD      BOOKED
FRI 0730 04 Aug 00 WELL 1/0 30 PE BPAD      OPEN
FRI 0800 04 Aug 00 WELL 1/0 30 PE BPAD      OPEN
FRI 0830 04 Aug 00 WELL 1/0 30 PE BPAD      OPEN
FRI 0900 04 Aug 00 WELL 1/0 30 PE BPAD      OPEN
FRI 0930 04 Aug 00 WELL 1/1 30 PE BPAD      BOOKED
FRI 1000 04 Aug 00 WELL 1/1 30 PE BPAD      BOOKED
FRI 1030 04 Aug 00 WELL 1/0 30 PE BPAD      OPEN
FRI 1100 04 Aug 00 WELL 1/1 30 PE BPAD      BOOKED
+ FRI 1130 04 Aug 00 WELL 1/0 30 PE BPAD      HOLD
*****
Select one slot to Split, Book, or Overbook.
Select multiple consecutive slots to Join.
Press F9 to view additional appointment data
===== End Screen 3: =====
```

8. The system displays all schedule slots for that day regardless of the schedule slot status (e.g., open, booked, cancelled, wait, hold). The system allows the authorized user to :
 - Select one slot to Split, Book, or Overbook
 - Select multiple consecutive slots to Join
 - Press F9 to view additional appointment data
9. As part of Appointment Standardization, Phase II, Detail Codes linked to schedule slots will be added to the schedule slot display list.

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10. Whether the authorize user selects to one or multiple consecutive slots, the system will redisplay the [HCF Booking option] SINGLE PATIENT BROWSE screen with either the (J)oin or (S)plit action displayed on the action bar depending on whether the authorized user selected one or more slots to modify (refer to Screen 4)

===== Start Screen 4: =====

PCM MTF SINGLE PATIENT BROWSE
Patient: BLITON,JERALD FMP/SSN: 20/278-55-5025
Place of Care PRIMARY CARE CLINIC
POC Phone: 234-5678
Provider: POTTER,HARRY Date: 04 Aug 2000

```
*****
* FRI 0700 04 Aug 00 WELL 1/1 30 PE BPAD          BOOKED
* FRI 0730 04 Aug 00 WELL 1/0 30 PE BPAD          OPEN
  FRI 0800 04 Aug 00 WELL 1/0 30 PE BPAD          OPEN
  FRI 0830 04 Aug 00 WELL 1/0 30 PE BPAD          OPEN
  FRI 0900 04 Aug 00 WELL 1/0 30 PE BPAD          OPEN
  FRI 0930 04 Aug 00 WELL 1/1 30 PE BPAD          BOOKED
  FRI 1000 04 Aug 00 WELL 1/1 30 PE BPAD          BOOKED
  FRI 1030 04 Aug 00 WELL 1/0 30 PE BPAD          OPEN
  FRI 1100 04 Aug 00 WELL 1/1 30 PE BPAD          BOOKED
+ FRI 1130 04 Aug 00 WELL 1/0 30 PE BPAD          HOLD
*****
```

Select (J)oin, (V)iew, or (Q)uit:

===== End Screen 4: =====

11. If multiple consecutive slots are selected and the authorized user selects the (J)oin action, the system will display the SINGLE PATIENT BROWSE – CHANGE screen (refer to Screen 5) and allow the authorized user to enter the new schedule slot data for the newly joined slot.
12. If a single slot is selected and the authorized user selects the (S)plit action, the system will display the SINGLE PATIENT BROWSE – CHANGE screen (refer to Screen 5) and allow the authorized user to enter the new schedule slot data for the two newly split consecutive schedule slots.

===== Start Screen 5: =====

APPOINTMENT SLOTS: 1 SINGLE PATIENT BROWSE - CHANGE

FRI 0700 04 Aug 00 NEW 1/0 30 PE BPAD OPEN

Clinic: PRIMARY CARE CLINIC - NO
Provider: POTTER,HARRY
Division: NAVY OUTPATIENT DIVISION

Booked appointments:
Maximum overbooks allowed: 0
Day of Week: FRI

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Appointment Slot Status: OPEN

Appointment Type: WELL

Duration: 45 minutes

Detail Codes:

BPAD

STRESS

Number of patients: 1

Appointment SLOT Comment:

Appointment Change Reason: Appointment Type/Detail value not appropriate

File/exit Abort Edit

File changes and exit.

===== End Screen 5: =====

13. When joining two consecutive slots, the system allows the authorized user to:

- Modify the appointment type
- Modify the slot duration, not to exceed the total # of minutes of the all slots selected to be joined.
- Add/Edit Detail Codes linked to the slots being joined
- Change # of patients for the newly joined slot
- Enter/Edit Appointment Comment
- Enter reason for change of appointment type/detail codes, if modified.

14. When splitting a schedule slot into two new consecutive schedule slots, the system will display the SINGLE PATIENT BROWSE – CHANGE screen twice and allow the authorized user to enter the new schedule slot data for each new schedule slot.

15. When the authorized user has entered and file the appropriate schedule slot data, the system redisplay the [HCF Booking option] SINGLE PATIENT BROWSE screen and action bar with the newly joined slot or the new split slots displayed in the middle window (refer to Screen 6).

===== Start Screen 6: =====

PCM MTF SINGLE PATIENT BROWSE

Patient: BLITON,JERALD

FMP/SSN: 20/278-55-5025

Place of Care PRIMARY CARE CLINIC

POC Phone: 234-5678

Provider: POTTER,HARRY

Date: 04 Aug 2000

* FRI 0700 04 Aug 00 WELL 1/0 60 STRESS BPAD	OPEN
FRI 0800 04 Aug 00 WELL 1/0 30 PE BPAD	OPEN
FRI 0830 04 Aug 00 WELL 1/0 30 PE BPAD	OPEN
FRI 0900 04 Aug 00 WELL 1/0 30 PE BPAD	OPEN

DRAFT

FRI 0930 04 Aug 00 WELL 1/1 30 PE BPAD	BOOKED
FRI 1000 04 Aug 00 WELL 1/1 30 PE BPAD	BOOKED
FRI 1030 04 Aug 00 WELL 1/0 30 PE BPAD	OPEN
FRI 1100 04 Aug 00 WELL 1/1 30 PE BPAD	BOOKED
+ FRI 1130 04 Aug 00 WELL 1/0 30 PE BPAD	HOLD

.....
Select (S)plit, (B)ook, (V)iew, or (Q)uit:

===== End Screen 6: =====

16. The system automatically selects the newly joined slot or the new split slots for booking and updates the action bar accordingly (i.e., one slot selected, (S)plit action displayed; two slots selected, (J)oin action displayed).
17. If the authorized user selects the (B)ook action, the system displays the FILE APPOINTMENT screen and allows the authorized user to book the selected appointment/s or modify the select schedule slot data (refer to PCM Booking, Screen 7 for more detail).

Cancel By Patient

[PAS 3.2.10.3.2.30-1.0, PAS 3.2.10.3.2.30-2.0, PAS 3.2.10.3.2.30-3.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>CHCF
2. When an authorized user elects to Cancel/Reschedule a pending patient appointment using the Cancel By Patient option, the system displays the CANCELLATION BY PATIENT SEARCH CRITERIA screen and action bar. When the authorized user selects the (C)hange Search Criteria action, the system displays the search criteria in the middle window of the CANCELLATION BY PATIENT SEARCH CRITERIA screen. The system then allows the authorized user to select and enter the appropriate search criteria for the Cancel By Patient pending appointment search (refer to Screen 1).

===== Start Screen 1: =====

CANCELLATION BY PATIENT SEARCH CRITERIA

Patient:	FMP/SSN:
Clinic:	Clinic Phone:
Provider:	ATC Category:
Detail Codes:	Appt Type:
Time Range: 1454 to 1454	Duration:
Dates:	Srv Type:
Days of Week:	

=====

ATC Category
Patient
Clinic
Provider
Appointment Type
Duration
Detail Codes
+ Time Range

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=====Clinic and Patient are required =====
Use SELECT key to select SEARCH CRITERIA to be changed

===== End Screen 1: =====

3. 'As part of Appointment Standardization, Phase II, the authorized user may select appointment type, duration and detail codes as secondary search criteria in order to narrow the search for pending appointments to be cancelled/rescheduled.
4. Once the authorized user has selected the search criteria to be modified, the system will prompt the authorized user to enter the new search criteria.
5. As soon as the new criteria has been entered and the authorized user has pressed 'RETURN' to continue, the system will search for and display all pending appointments that meet the search criteria entered in the middle window of the CANCEL/RESCHEDULE PATIENT APPOINTMENTS screen (refer to Screen 2)

===== Start Screen 2 =====

CANCEL/RESCHEDULE PATIENT APPOINTMENTS

Patient: SPALDING,BEVERLY A

Clinic: GENERAL MEDICINE

Provider: KINLAW,VALERIE

Detail Codes:

Time Range: 0001 to 2400

Dates:

Days of Week: =====

WED 1500 05 SEP 00 WELL 30 PE BPAD BPNPR

FMP/SSN: 31/595-10-3377

Clinic Phone: 234-0932

ATC Category:

Appt Type:

Duration:

Srv Type:

GMED KINLAW,VALERIE

=====

Use SELECT key to select appointments to be cancelled/rescheduled

===== End Screen 2: =====

6. Each patient appointment displayed in the middle window will now include the appointment duration and up to 3 appointment detail codes, if any, along with day, date and time of the appointment, appointment type, clinic abbreviation and/or provider.
7. As soon as the authorized user selects a pending appointment from the list, the system will redisplay the CANCELLATION BY PATIENT screen and action bar and allow the authorized user to cancel or reschedule the selected pending appointment.
8. If the authorized user elects to reschedule the pending appointment, the system will redisplay the BOOKING SEARCH CRITERIA screen and require the authorized user to enter an Access To Care category code.
9. Once the ATC category code has been entered the system will then search for and display all available appointment slots based on search criteria entered (e.g., ATC category code) and/or the appointment data being rescheduled (e.g., appointment type, provider, duration etc).
10. As in all HCF available appointment searches, the system will search for available appointment slots based on the search criteria entered. The system will display a list of available appointment slots on the appropriate HCF Booking screen (PCM Booking, Referral Booking, Non-Enrolled Booking, or Self-Referral Booking screen) depending on which booking option was used to book the appointment being rescheduled.

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11. The system then allows the authorized user to book the appointment, modify the selected appointment data prior to booking the appointment and or quit the booking process (refer to the appropriate HCF Booking option in this UDF for more detail.)

Cancel By Facility

[PAS 3.2.10.3.2.29-1.0, PAS 3.2.10.3.2.29-2.0, PAS 3.2.10.3.2.29-3.0]

1. MENU PATH: C=>PAS=>S=>SCHE=MSCH=CMSC
2. If an authorized user selects the Cancel By Facility option, the system will prompt the user to enter clinic, provider and date range for the schedule slots to be cancelled.
3. As soon as the authorized user has entered the Schedule Search Criteria, the system will load the schedules and query the authorized user to cancel all the schedules for the date range entered.
4. If the authorized user elects to cancel all the schedule slots, the system will prompt the authorized user to enter a reason for cancellation.
5. If the authorized user elects to cancel individual schedule slots, the system displays the FACILITY CANCELLATION screen and allows the authorized user to select the slots to be cancelled (refer to Screen 1).

===== Start Screen 1: =====

FACILITY CANCELLATIONS

Provider: POTTER,HARRY

Use **SELECT** Key to select slots to **CANCEL**

6. Two new fields, Duration and Detail Codes, will be added to the FACILITY CANCELLATIONS schedule display window. When the authorized user has selected one or more schedule slots to cancel and pressed 'RETURN' to continue, the system will prompt the authorized user for a cancellation reason
7. Once the authorized user has entered the reason for cancellation and if any of the cancelled schedule slots have been previously booked, the system will display the CANCELLATION NOTICES screen (refer to Screen 2)

TIME	TYPE	DUR	DETAIL	CODES	PATIENT	FMP/SSN
1730	PCM	30	PE	BPAD	STONER,SUZANNE	20/665-33-2112
Cancel Reason:			PROV CANCELLED:		Appt Comment:	

===== End Screen 2: =====

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9. If the authorized user elects to contact a patient whose appointment has been cancelled, the system will allow the authorized user to reschedule the appointment that was cancelled by the facility. If the authorized user elects to reschedule the cancelled appointment, the system will search for available appointments based on the appointment cancelled. The system will search for and depending on which HCF booking option was used to book the cancelled appointment, display a list of all available appointment slots on the appropriate HCF booking screen. The system will then allow the authorized user to select a new appointment slot from the display list and book the appointment for the specified patient. (Refer to the HCF Booking options for more detailed information on booking an appointment.)

4.5 PAS 09735 **Operational Forces (OPS Forces) Booking** POC: Jane Barron

A. Functional Overview

As part of the Appointment Standardization Project Phase II, the Composite Health Care System (CHCS) Health Care Finder PCM Booking module will be modified to provide the capability to book a PCM appointment for an Active Duty patient, whose enrolling DMIS ID is defined as Ops Forces, with any provider in any place of care in any MCP Provider Group to which the patient's assigned PCM is a member.

A new OPS Forces Booking Allow field will be added to the MCP Place Of Care Profile in the Place of Care Enter/Edit option on the Provider Network File/Table Maintenance Menu in MCP. If the Ops Forces Booking Allowed flag is set to YES in the patient's enrollment place of care profile, the system will allow an authorized user to book an appointment for the Ops Forces patient with any provider in any place of care in any MCP Provider Group of which the patient's assigned PCM is a member.

B. Functional Dependencies

1. The OPS Forces Booking Allowed field must be set to YES for the place of care associated with the enrollment.
2. An authorized user may book an appointment for an Ops Forces patient with any provider in any place of care in any MCP Provider Group of which the patient's assigned PCM is a member.

C. Business Rules

1. The Enrolling Division for the specified patient must be linked to an OPS Forces DMIS ID.
2. The patient must be Active Duty.
3. The system will only allow an authorized user to book an appointment for the Ops Forces patient with any provider in any place of care in any MCP Provider Group of which the patient's assigned PCM is a member.

D. Workflow

1. MENU PATH: C=>PAS=>M=>FMCP=>PTAB=>PLAC
2. As soon as the authorized user selects the Place of Care Enter/Edit option, the system allows the authorized user to enter a new place of care or edit an existing place of care.
3. On the GRP PL2a PLACE OF CARE screen, the system will allow the authorized user to set the new OPS FORCES BOOKING ALLOWED field (refer to Screen 1).

===== Start Screen 1: =====
MCP PLACE OF CARE: PRIMARY CARE CLINIC GRP PL2a PLACE OF CARE

=====

Type of Facility: MULTISERVICE CLINIC

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Appt Contact:

DMIS ID#: 0124 NMC PORTSMOUTH

OPS Forces Booking Allowed: YES

```
-----Hours of Service-----
Day of Week      AM          PM
MONDAY           0800 - 1100    1201 - 1700
TUESDAY           0800 - 1200    1230 - 1700
WEDNESDAY         0800 - 1200    1230 - 1700
THURSDAY          0800 - 1200    1230 - 1700
+ FRIDAY          0800 - 1200    1230 - 1600
```

Ask for Help = HELP Screen Exit = F10 File/Exit = DO INSERT OFF

===== End Screen 1: =====

4. When the OPS FORCES BOOKING ALLOWED field for the place of care linked to the enrollment is set to YES, the system will only allow an authorized user to book an appointment for the Ops Forces patient with any provider in any place of care in any MCP Provider Group of which the patient's assigned PCM is a member.
5. When an authorized user logs into HCF Booking and selects PCM Booking, the system will search for any available appointment slot slots with the patient's assigned PCM. If no schedule slots are available for PCM Booking, then the system will check the enrolled patient's assigned place of care profile. If the patient's enrollment place of care allows Ops Forces Booking, the system will prompt the authorized user to search for and display all available appointments with any provider in any place of care linked to any MCP Provider Group that the assigned PCM is a member (refer to Screen 2).

===== Start Screen 2: =====

OPS FORCES PCM BOOKING

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: SICKBAY 12
PLOC Phone: 234-5678
Provider: POTTER,HARRY SD
Location: 23708
Date Range: 20 Aug 2000 to 01 Oct 2000
Time Range: 0001 to 2400

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
Appt Type:
Spec Type:
Clinic Spec:
Provider Spec:
Days of Week: M TU W TH F SA SU

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Selected patient is an OPS FORCES MCP patient. Do you want to search for available appointments with other Providers in all MCP Provider Groups where the assigned PCM is a member - NO? Yes//

===== End Screen 2: =====

6. If the authorized user accepts the prompt to search for available appointments with other providers, the system will then search for and display a list of all providers/places of care with available appointments where the assigned PCM is a member of the group. The system will prompt the authorized user to select the provider/place of care to book an appointment (refer to Screen 3).

===== Start Screen 3: =====

OPS FORCES PCM BOOKING

Patient: BLITON,JERALD
Patient Type: MCP/ACTIVE DUTY
Place of Care: SICKBAY 12
PLOC Phone: 234-5678
Provider: POTTER,HARRY SD
Location: 23708
Date Range: 20 Aug 2000 to 01 Oct 2000
Time Range: 0001 to 2400

FMP/SSN: 20/278-55-5025
ATC Category: ACUTE
Appt Type:
Spec Type:
Clinic Spec:
Provider Spec:
Days of Week: M TU W TH F SA SU

Provider	Place of Care
WEEZLY,ARTHUR	FAMILY PRACTICE/PRIMARY CARE
DUMBLEDORE,AVERY	GENERAL MEDICINE

=====

Use the SELECT key to select the provider/place of care to book a primary care appointment

===== End Screen 3: =====

7. As soon as the authorized user selects the provider/place of care from the picklist, the system will search for and display a list of all available appointments and allow the authorized user to book the appointment (refer to PCM Booking , Screen 5).

A. Functional Overview

As part of the Appointment Standardization Project Phase II, the PAS/MCP Output Report/Forms options will be modified to include as output appointment detail codes linked to either a schedule slot or an appointment:

- Print Templates
- Print Schedules
- Print Clinic/Provider Roster
- Print Outpatient Encounter Forms
- Display Patient Appointments
- Non-MTF Log Report

The Appointment Type Profile List and the Clinic Profile List options will also be modified to include as output the new data elements that were added to the Appointment Type (i.e., Standard Appt Type flag) and Hospital Location (i.e., Clinic Detail Codes multiple and Self-Referring Allowed flag) files.

In addition, two new reports, Self-Referral Booking Report and Appointment Detail Code Workload Report will be developed.

B. Functional Dependencies

Appointment Detail Codes will only appear as output on the appropriate reports/forms if they were linked to templates, schedules or appointment at the time templates/schedules were created/edited or when an appointment was booked.

C. Business Rules

An authorized user may select up to three appointment detail codes to link to an individual schedule slot or patient appointment.

D. Workflow

List Appointment Type

[PAS 3.2.10.3.2.5-1.0]

1. MENU PATH: C=>PAS=>S=>PROF=>LPRO=>5
2. When an authorized user elects to generate the Appointment Type Profile List, the new MEDICAL APPT TYPE field will displayed as output on the report (refer to Screen 1).

===== Start Screen 1: =====

APPOINTMENT TYPE PROFILE LIST

28 Jun 2000@0936 PAGE 1

SEARCHABLE

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NAME	DESCRIPTION	APPT SLOTS?	STATUS	CATEGORY	MEDICAL APPT TYPE
ACUT	ACUTE APPT	YES	ACTIVE	INITIAL	YES
ACUT\$	ACUTE APPT; MTF	YES	ACTIVE	INITIAL	YES
APV	AMBULATORY PATIENT VISIT	YES	ACTIVE	INITIAL	YES
EST	ESTABLISHED FOLLOW-UP	YES	ACTIVE	FOLLOW-UP	YES
EST\$	ESTABLISHED FOLLOW-UP; MTF	YES	ACTIVE	FOLLOW UP	YES
EXAM	YEARLY EXAM	YES	ACTIVE	FOLLOW_UP	NO
EXTRA	EXTRACTION APPOINTMENT	YES	ACTIVE	FOLLOW_UP	NO
GRP	GROUP	YES	ACTIVE	INITIAL	YES
GRP\$	GROUP; MTF	YES	ACTIVE	INITIAL	YES
N-MTF	NON-MTF APPOINTMENT	NO	ACTIVE	FOLLOW_UP	YES
PCM	INIT PRIMARY CARE APPT	YES	ACTIVE	INITIAL	YES
PCM\$	INIT PRIMARY CARE APPT; MTF	YES	ACTIVE	INITIAL	YES
PROC	PROCEDURE APPT	YES	ACTIVE	INITIAL	YES
PROC\$	PROCEDURE APPT; MTF	YES	ACTIVE	INITIAL	YES
ROUT	ROUTINE APPT	YES	ACTIVE	INITIAL	YES
ROUT\$	ROUTINE APPT; MTF	YES	ACTIVE	INITIAL	YES
SPEC	INIT SPECIALTY CARE APPT	YES	ACTIVE	INITIAL	YES
SPEC\$	INIT SPECIALTY CARE APPT; MTF	YES	ACTIVE	INITIAL	YES
T-CON*	TELEPHONE CONSULT	NO	ACTIVE	INITIAL	YES
TCON	TELEPHONE CONSULT	NO	ACTIVE	INITIAL	YES
TCON\$	TELEPHONE CONSULT; MTF	NO	ACTIVE	INITIAL	YES
WELL	WELLNESS/HEALTH APPT	YES	ACTIVE	INITIAL	YES
WELL\$	WELLNESS/HEALTH APPT; MTF	YES	ACTIVE	INITIAL	YES

===== End Screen 1: =====

Clinic Profile List

[PAS 3.2.10.3.2.6-1.0, PAS 3.2.10.3.2.6-2.0]

1. MENU PATH: C=>PAS=>S=>PROF=>LPRO=>3
2. When an authorized user elects to generate the Clinic Profile List, the new SELF-REFERRING ALLOWED field and the new DETAIL CODES multiple will displayed as output on the report (refer to Screen 1).

===== Start Screen 1: =====

CLINIC PROFILE LIST 28 Jun 2000@1053 PAGE 1

Name: PRIMARY CARE CLINIC-NO
Abbreviation: PCCNO

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Facility: MC NAVSTA SEWELLS
Division: NAVY OUTPATIENT DIVISION
Building Name:
Building Number:
Street Address:
ZIP: 23708
City:
State:
Clinic Location:
Clinic Availability:
Telephone:
Enrollee Lockout: YES
Type of Care: BOTH SPECIALTY AND PRIMARY CARE
Service: FAMILY PRACTICE SERVICE
Department: DENTAL DEPT
MEPRS Code: BGAA
Clinic Specialty: FAMILY PRACTICE /PRIMARY CARE
Wait List Activated: NO
Maximum Wait List Days: DAY(S)
Wait List Provider Mandatory:
Wait List Hold Duration: DAY(S)
Automatic Wait List Processing:
Schedule Hold Duration: 2 DAY(S)
Prompt for Requesting Service: NO
Patient Record Pull: 1 DAY(S)
Clinic Type: COUNT
Radiology Record Pull: 1 DAY(S)
Check Holiday File: YES
Roster Production: 1 DAY(S)
Activation Status: ACTIVATED
Access to Care Reporting: YES
Self-Referrals Allowed: YES
Prepare Reminder Notices: 14 DAY(S)
Cost Pool Code:
Available Schedule: 30 DAY(S)
Clinic Appt Instructions:
Detail Codes:
BEPC BIRTH AND EARLY PARENTING CLASS
BK BACK PAIN OR PROBLEM

---Appointment Types---

Appointment Type: PCM

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Duration:	30 MINUTES
Status:	ACTIVE
Workload Type:	COUNT
Referral Required:	NO
Pull Patient Record:	YES
Pull Radiology Record:	NO
Produce Encounter Form:	YES
Send Reminder Notice:	YES
Total # of Overbooks:	0
Max # of Overbooks per Slot:	
Instructions:	

Press <RETURN> to continue

===== End Screen 1: =====

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Print Schedules

[PAS 3.2.10.3.2.10-1.0, PAS 3.2.10.3.2.10-2.0, PAS 3.2.10.3.2.10-3.0]

1. MENU PATH: C=>PAS=>S=>SCHE=>PSCH
2. When an authorized user elects to print schedules for a specified clinic and/ or provider for a specified date range, Appointment duration and Detail Codes currently linked to a schedule slot will displayed as output on the report (refer to Screen 1).

===== Start Screen 1: =====

Navy Outpatient

30 Jun 2000@1005 Page 1

PROVIDER SCHEDULE

Monday 07 Aug 2000

Division: NAVY OP

Clinic: PRIMARY CARE CLINIC

Provider: FROST,ROBERT

Start Time	Appt Type	Slots/Book Dur	Detail Codes	Slot Comment	Slot Status
0700	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0730	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0800	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0830	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0900	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
0930	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
1000	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
1030	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
1100	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----
1130	PCM	1/0 30	PE BPAD	SLOT COMMENT XXXXXXXXXXXX	-----

===== End Screen 1: =====

Print Clinic/Provider Rosters

[PAS 3.2.10.3.2.12-1.0, PAS 3.2.10.3.2.12-2.0]

1. MENU PATH: C=>PAS=>M=>CDSK=>ORM
2. When an authorized user elects to print Clinic/Provider Rosters, Appointment Duration and Detail Codes currently linked to a schedule slot and/or appointment will displayed as output on the report (refer to Screen 1).

===== Start Screen 1: =====		02 Jul 2000@1443 Page 1	
NMC PORTSMOUTH			
Personal Data - Privacy Act of 1974 (PL 93-579)			

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PROVIDER ROSTER (One Clinic)
From: 07 Aug 2000 To: 07 Aug 2000

Division: NAVY OUTPATIENT DIVISION
Clinic: PRIMARY CARE CLINIC - NO

DEPT: PRIMARY CARE DEPARTMENT
Provider: FROST,ROBERT

Time	Appt Type	Detail Dur Code	Name Out/In Ward	Home Phone	FMP/SSN Work Phone
=====					
'*' next to patient name indicates a FROZEN-BOOKED slot					
'#' next to patient name indicates the schedule slot has been deleted					
0700	PCM	30 BPAD PE	BLITON,JERALD	20/004-23-3298	
			OUTPATIENT	H: 535-7265	W: 488-2301
0730	PCM	30 BPAD SCH	ANDERSON,FREDRICK	20/430-18-3498	
			OUTPATIENT	H: 535-6619	W: 488-4502
0800	PCM	30 BPAD BK	WARWICK,ANNE	20/234-500-3285	
			OUTPATIENT	H: 535-4329	W: 488-7231
.....					
===== End Screen 1: =====					

Print Outpatient Encounter Form

[PAS 3.2.10.3.2.13-1.0, PAS 3.2.10.3.2.13-2.0]

1. MENU PATH: C=>PAS=>M=>CDSK
2. When an authorized user elects to print an outpatient encounter form for a scheduled appointment, Appointment Duration and Detail Codes currently linked to a pending appointment will displayed as output on the form (refer to Screen 1).

===== Start Screen 1: =====

NMC PORTSMOUTH	Division: PORTSMOUTH
Personal Data - Privacy Act of 1974 (PL 93-579)	Automated Version of SF600
Printed: 05 Aug 2000@0800	

Primary Care Clinic	CRAWFORD,JACQUI	05 Aug 2000@1030	PCM	30	BABA
Detail Codes: PE BRAD					
REF:	CMT:				
RSN:					
INSURANCE YES/NO:					

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BP: PULSE: RESP: TEMP: HT: WT: AGE:

ALLERGIES:

ADDITIONAL COMMENTS:

```
=====
20/278-55-5025 BLITON,JERALD A11
                01 Jan 1960 MALE W:619 535 7265 H:619 546 6121
                Spon: BLITON,JERALD CIC:
                CS: Rank: CPT D:619 535 7265
SF600 Unit: CO A 131 SIG BN RR: NI - OUTPATIENT RECORDS
=====
```

===== End Screen 1: =====

Display Patient Appointments

[PAS 3.2.10.3.2.14-1.0]

1. MENU PATH: C=>PAS=>M=>CDSK=>DPA
2. When an authorized user elects to display/print a patient's appointment history, Appointment Duration and Detail Codes currently linked to an appointment will displayed as output (refer to Screen 1).

===== Start Screen 1: =====

DISPLAY PATIENT APPOINTMENTS
Personal Data - Privacy Act of 1974 (PL 93-579)
FUTURE APPOINTMENTS FOR SPALDING,BEVERLY A 31/595-10-3377

CLINIC/DIV	PROVIDER	DATE/TIME	APPT TYPE/DUR DETAIL CODE	STATUS
PRIMARY CARE CLINIC /N-IN	PETERSON,PET	02 Jul 2000@1300	NEW 30 PE BPAD	PENDING

WAIT LIST REQUESTS FOR SPALDING,BEVERLY A 31/595-10-3377

CLINIC/DIV	APPT TYPE/DUR DETAIL CODE	PRI	DATE IN	TARGET DATE	PROVIDER
PRIMARY CARE CLINIC /N-IN	WELL 30		02 Jul 2000	01Aug 2000	

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SCOLI BPAD

Press <RETURN> to continue

===== End Screen 1: =====

Non-MTF Log Report

[PAS 3.2.10.3.2.21-1.0, PAS 3.2.10.3.2.21-2.0, PAS 3.2.10.3.2.21-3.0, PAS 3.2.10.3.2.21-4.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>BHCF
2. When an authorized user elects to display/print the Non-MTF Log Report, any Appointment Detail Codes currently linked to a Non-MTF appointment will displayed as output (refer to Screen 1).

===== Start Screen 1: =====

NMC PORTSMOUTH 04 Jul 2000@1423 Page 1
Personal Data - Privacy Act of 1974 (PL 93-579)

Non MTF Appointment Log By Patient
From: 08 Sep 1999 To: 04 Jul 2000

Patient Name	Patient SSN	FMP/Sponsor SSN	Current Enrollment Status
BLITON, JERALD	278- 55- 5025	20/278- 55- 5025	ENROLLED

Place of Care	Provider	Appointment Date/Time	Referral Number	Appointment Detail Codes
---------------	----------	-----------------------	-----------------	--------------------------

NON- MTF CLINIC

TARPIN, DANIELE

01 Feb 2000@1102	20000000074	PE BPAD
01 Feb 2000@1111	20000000075	SCH BPAD BPNPR
02 Feb 2000@1045	20000000078	
04 Feb 2000@1354	20000000079	

===== End Screen 1: =====

Self-Referral Appointment Booking Report

[PAS 3.2.10.3.2.23-1.0, PAS 3.2.10.3.2.23-2.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>RHCF=>17
2. A new Self-Referral Appointment Booking Report has been added to the Health Care Finder Reports Menu (refer to Screen 1).

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=====	Start Screen 1:	=====
1	Agreement Type Referral Summary	
2	Specialty Type Referral Summary	
3	Provider Network List	
4	PCM Activity Report	
5	Provider Patient Workload Report	
6	Refused Appointments Report	
7	Telephone Consult Report	
8	Non MTF Appointment Log	
9	Appointment Order Review Report	
10	Print SF513 for Appointments	
11	Generate DD2161 - Referral for Civilian Care	
12	Non Appointed Consults/Referrals by Rev Date/Time	
13	Referral Statistics by Consult Procedure Name	
14	Requested Location Referral Statistics	
15	Requesting Location Referral Statistics	
16	Consult Delta Time Rpt for Reviewing and Appting	
17	Self-Referral Booking Report	
18	Appointment Detail Code Workload Report	

Select Health Care Finder Reports Menu Option:

=====	End Screen 1:	=====
-------	---------------	-------

3. As soon as the authorized user elects to generate the Self-Referral Booking Report, the system displays the SELF-REFERRAL BOOKING REPORT screen and allows the authorized user to select the division/s, clinic, provider, date range, and output device (refer to Screen 2).

=====	Start Screen 2:	=====
	SELF-REFERRAL BOOKING REPORT	

Division:
Date Range:

=====		=====
-------	--	-------

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=====

Select (O)ne, (M)ultiple, (A)ll Divisions or (Q)uit:

===== End Screen 2: =====

4. When the authorized user selects one division and enters the appropriate division for which to report the Self-Referral Booking Summary report data, the system will then prompt the authorized user to select one, multiple or all clinics. If the authorized user selects one clinic, the system will then prompt the authorized user to select one, multiple or all providers in the specified clinic.
5. If the authorized user selects multiple divisions or all divisions, the system will automatically generate to generate the report all providers in all self-referrals allowed clinics in all divisions . If the authorized user selects one division but multiple or all clinics with in the specified division, the system will generate the report for all providers within the specified clinics.
6. Once the authorized user selects one, multiple or all divisions/clinics/providers, the system displays the Report Month & Year OR '^' to enter specific date range: [month/year]// prompt. The system allows the authorized user to accept the default of the previous month/year or to enter '^' in order to enter a specific start and stop date for the output report.
7. When the date range for the output report has been entered, the system displays the COMPLEX REPORT warning message in the middle window of the SELF-REFERRAL BOOKING REPORT screen and the Do you want to proceed with this report? No// prompt.
8. If the authorized user responds YES to the Do you want to proceed with this report? No// prompt, the system will prompt the authorized user for the output device.
9. When the authorized user has entered the appropriate output device and pressed 'RETURN' to continue, the system will return the authorized user to the reports menu and generate the report to the specified output device (refer to Screen 3).

===== Start Screen 3: =====

PORTSMOUTH VA

31 Aug 2000@0813 Page 1

Personal Data - Privacy Act of 1974 (PL 93-579)

SELF-REFERRAL BOOKING

From: 01 Jul 2000 To: 31 Jul 2000

Division: PORTSMOUTH

Clinic: GENERAL MEDICINE

=====

Appt Date/Time	Appt Type	Detail Dur Code	Patient	FMP/SSN
-------------------	--------------	--------------------	---------	---------

=====

Clinic Specialty: OCCUPATIONAL HEALTH

Provider: SLOAN,MARK

01 JUL 00 0700 WELL 30 BPAD HEAD

BLITON,JERALD

20/442-46-4725

01 JUL 00 0730 WELL 30 BPAD HEAD

ANDERSON,FREDRICK

20/430-18-3498

.....

31 JUL 00 0800 WELL 30 BPPR HEAD

WARWICK,ANNE

30/234-50-3285

.....

Provider Subtotal: 51

Provider: POTTER,HARRY

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05 JUL 00 0700 WELL 30	BPAD HEAD	BLITON,MARK	20/342-20-8623
05 JUL 00 0730 WELL 30	BPPR HEAD	ANDERSON,MARIA	30/430-18-3498
.....			
30 JUL 00 0800 WELL 30	BPPR HEAD	LUKE,ANNE	30/004-50-5510

.....
Provider Subtotal: 37

Clinic Specialty Subtotal: 88

Clinic Specialty: PREVENTIVE MEDICINE

=====

Provider: KILDARE,RICHARD

01 JUL 00 0700 WELL 30	BPAD TOBCES	BLITON,JERALD	20/442-46-4725
01 JUL 00 0730 WELL 30	BPAD TOBCES	ANDERSON,FREDRICK	20/430-18-3498
.....			
31 JUL 00 0800 WELL 30	BPPR TOBCES	WARWICK,ANNE	30/234-50-3285

.....
Provider Subtotal: 51

Provider: WELLBY,MARCUS

05 JUL 00 0700 WELL 30	BPAD TOBCES	BLITON,MARK	20/342-20-8623
05 JUL 00 0730 WELL 30	BPPR TOBCES	ANDERSON,MARIA	30/430-18-3498
.....			
30 JUL 00 0800 WELL 30	BPPR HEAD	LUKE,ANNE	30/004-50-5510

.....
Provider Subtotal: 37

Clinic Specialty Subtotal: 88

Clinic Total: 384
Division Total: 1027

===== End Screen 3: =====

8. The purpose of the Self-Referral Booking Report is to provide a report by clinic specialty of the number of self-referrals booked to individual clinics that allow self-referral booking within a division for the date range specified. The Self-Referral Booking Report is sorted by division, clinic, clinic specialty, and provider. The output for the report includes the following appointment data booked through the Self-Referral Booking option:
- Appt Date/Time
 - Appt Type
 - Duration
 - Detail Codes
 - Patient

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- FMP/SSN
- Provider Subtotals
- Clinic Specialty Subtotals
- Clinic Totals
- Division Totals

Appointment Detail Code Schedule Utilization Report

[PAS 3.2.10.3.2.23-1.0, PAS 3.2.10.3.2.23-2.0]

1. MENU PATH: C=>PAS=>M=>HMCP=>RHCF=>18
2. A new Appointment Detail Code Schedule Utilization Report report option has been added to the Health Care Finder Reports Menu (refer to Self-Referral Booking Report option, Screen 1 – HCF Reports Menu).
3. As soon as the authorized user elects to generate the Appointment Detail Code Schedule Utilization Report, the system displays the APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT screen and allows the authorized user to select the division/s, clinic, date range, and output device (refer to Screen 1).

===== Start Screen 1: =====
APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT

Division:

Date Range:

Clinic:

=====

Select (O)ne, (M)ultiple, (A)ll Divisions or (Q)uit:

===== End Screen 1: =====

4. When the authorized user selects one division and enters the appropriate division for which to report the Appointment Detail Code Schedule Utilization report data, the system will then prompt the authorized user to generate the report for one, multiple, or all clinics within the specified division.

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5. If the authorized user selects one clinic, the system will then prompt the authorized user to select one, multiple or all providers in the specified clinic.
6. Once the authorized user selects one, multiple or all divisions/clinics, the system displays the Report Month & Year OR '^' to enter specific date range: [month/year]// prompt. The system allows the authorized user to accept the default of the previous month/year or to enter '^' in order to enter a specific start and stop date for the output report.
7. When the date range for the output report has been entered, the system displays the COMPLEX REPORT warning message in the middle window of the APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION
8. REPORT screen and the Do you want to proceed with this report? No// promptIf the authorized user responds YES to the Do you want to proceed with this report? No// prompt, the system will prompt the authorized user for the output device. When the authorized user has entered the appropriate output device and pressed 'RETURN' to continue, the system will return the authorized user to the reports menu and generate the report to the specified output device (refer to Screen 2).

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===== Start Screen 2: =====
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APPOINTMENT DETAIL CODE SCHEDULE UTILIZATION REPORT
 From: 01 Jul 2000 To: 15 Jul 2000

Division: PORTSMOUTH

Clinic: PRIMARY CARE

Appt Type/ Detail Code	# Slots Created	# Slots Modified	#Fac Canc	# Booked Appts	Appointments Available to Patients				% Booked	% Unbooked	
					Unbooked Appt Slots						
					Frozen	Open	Waited	Total			
Provider: ANDERSON,MATTHEW											
PCM											
[No Detail Codes]	50	20	0	30	0	0	0	0	100.00	0.00	
PE BPAD	50	0	0	25	0	25	0	0	50.00	50.00	
PE BPPR	20	0	0	20	0	0	0	0	100.00	0.00	
Subtotal:	120	20	0	75	0	25	0	0	75.00	25.00	
WELL											
ANGER	50	20	0	30	0	0	0	0	100.00	0.00	
ANGER BPAD	50	0	0	25	0	25	0	0	50.00	50.00	
ANGER BPPR	20	0	0	20	0	0	0	0	100.00	0.00	
Subtotal:	120	20	0	75	0	25	0	0	75.00	25.00	
Provider Subtotal:	240	40	0	150	0	50	0	0	75.00	50.00	
Clinic Subtotal: :	240	40	0	150	0	50	0	0	75.00	50.00	

.....
 Note: The Appointment Detail Code Schedule Utilization Report only reports those detail codes linked to a schedule slot when the schedule was either created or modified. If the appointment detail codes were modified or added during the appointment booking process, the new detail codes will not be reported on this report. Only the number of slots modified will be reported. The # of facility cancellations, the # of booked appts, # of frozen slots, # of open slots, # of waited slots, and %Booked/Unbooked is based on the # of Slots created minus the # of Slots modified

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SYSTEM IMPACTS

PAS 097360

POC: Debra Dyer

This assessment includes consideration of potential risk areas associated with Phase II of the Appointment Standardization project. It addresses performance and security issues and identifies down stream development and implementation issues and risk areas. The scope of the project and related technical assumptions are presented in Section 1.0 of this document.

A. Disk Space Utilization

This project will add data to the Appointment Detail Codes file created in Phase I and new standard appointment types to the existing Appointment Types file (#44.5). They are both located in the ^SDX global. There will be a new file created that will also be stored in the ^SDX global. The current size of ^SDX is between 25 and 300 DSM blocks and the weekly growth pattern is no more than 1 to 2 DSM blocks/6 weeks. It is anticipated for Phase II of this project that the growth of this global will change as the sites transition to and customize this functionality. Therefore, the ^SDX global, which resides on the MST volume set, should be monitored for changes in growth pattern. There will be a new field in the Place of Care File (#8553, ^CPC) to accommodate the new OPS Forces Booking functionality. This will be negligible in size.

With this project, detail codes will be linked to clinic schedule templates and also to individual patient appointments. New fields will be added to existing files to accommodate these changes. Although each new entry will be negligible in DSM block size, as more patients and clinics include detail codes this could change the growth pattern of the ^SC, ^SDPT, ^SDE and ^SDT globals. As the sites make the transition to using this functionality, these globals should be monitored for changes in growth patterns.

In addition, Phase I and Phase II of Appointment Standardization depends on the site completely using Managed Care functionality. While most sites have started this effort and have continued during Phase I, there could still be a few that have not completed their file and table builds. Managed Care involves many files and tables and the use of many globals to store information. Please refer to System Impact section of the Appointment Standardization Phase I PR&DD for more detailed information.

B. Archive and Purge

There are not any archive or purge options for this project.

C. Performance Considerations

This project adds several different and more extensive search criteria and actions under the Health Care Finder Booking option. This, in addition to the selection of detail codes, could cause the CPU consumption of this option to increase. The HCF option is already a very consumptive option. Overall system CPU utilization and specific option CPU utilization should be evaluated during the testing and alpha phases. It is recommended, whenever possible, to run extensive reports during non-prime time.

D. Local Symbol Table

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G. User Perceived Impact

The PAS users will notice a significant change in the Health Care Finder Booking option. The HCF option will be changed to include the ability to select, search and change detail codes while booking appointments. There will be different search parameters available within the HCF Booking Module. The users have not been able to book appointments using the PAS Book Appointment option since Phase I, which will continue with Phase II. There will be a new option, Self-Referral Booking, included with this project. Report displays will change to reflect the additional data and 2 new reports will be developed.

Clinic templates and schedules will need to be modified to accommodate this new functionality. Users will need to be sufficiently trained for this ongoing project to continue to transition smoothly. Adhocs will also need to be changed to reflect the new file structure.

H. Conversions

1. A conversion will set the new Standard Appt Type flag and the Medical flag in the Appointment Type file to YES for the standardized appointment types.
2. A conversion will add additional standard detail codes to the Appointment Detail Codes file.

I. Site Parameters

None

J. Dependencies

1. The Managed Care process and functionality must be fully implemented at the site.
2. SMMR2 must have been installed.
3. Appointment Standardization Phase I must have been installed.
4. NED must have been installed and implemented.

K. Integration Issues

There are projects that are being developed concurrently with Appointment Standardization Phase II that also affect the managed care functionality (i.e., NED).

L. Implementation Considerations

- a. This project will be deployed as a CPET+ and will require downtime to install.
- b. The site manager should verify that there is enough disk space to allow for global growth.
- c. Sites should have performed MCP file and table builds and transitioned to the Managed Care process prior to the installation of this enhancement.
- d. Sites should have installed Appointment Standardization Phase I and NED.
- e. The users should be sufficiently trained for the transition to the HCF option and the use of standard appointment